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Fruit Situation

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U.S. Department of Agriculture

Approved by the World Food and Agricultural Outlook and Situation Board

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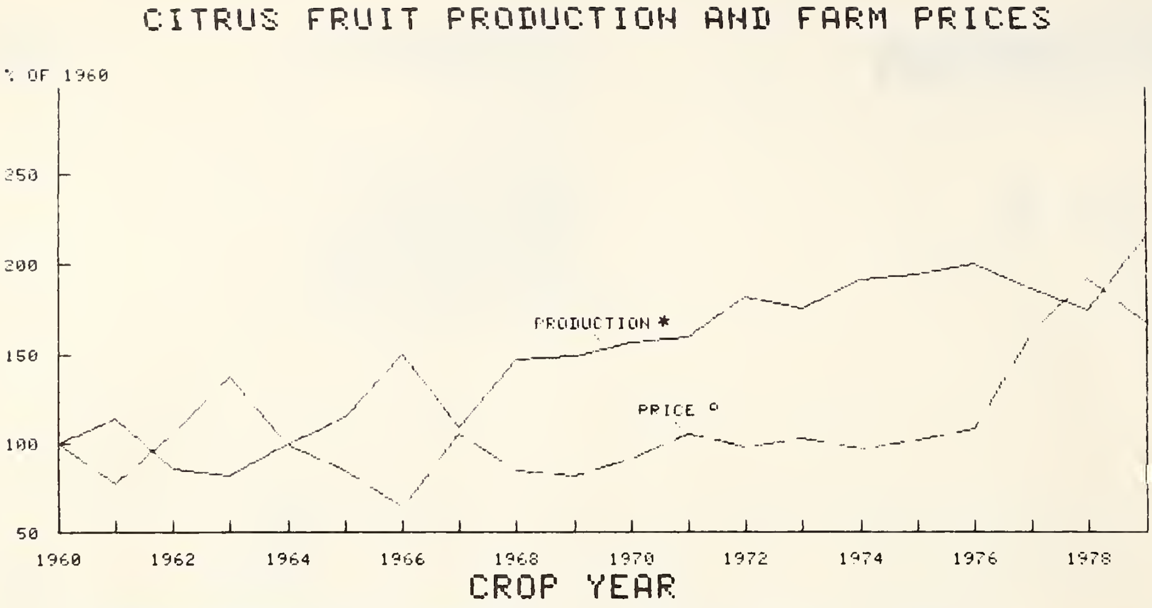
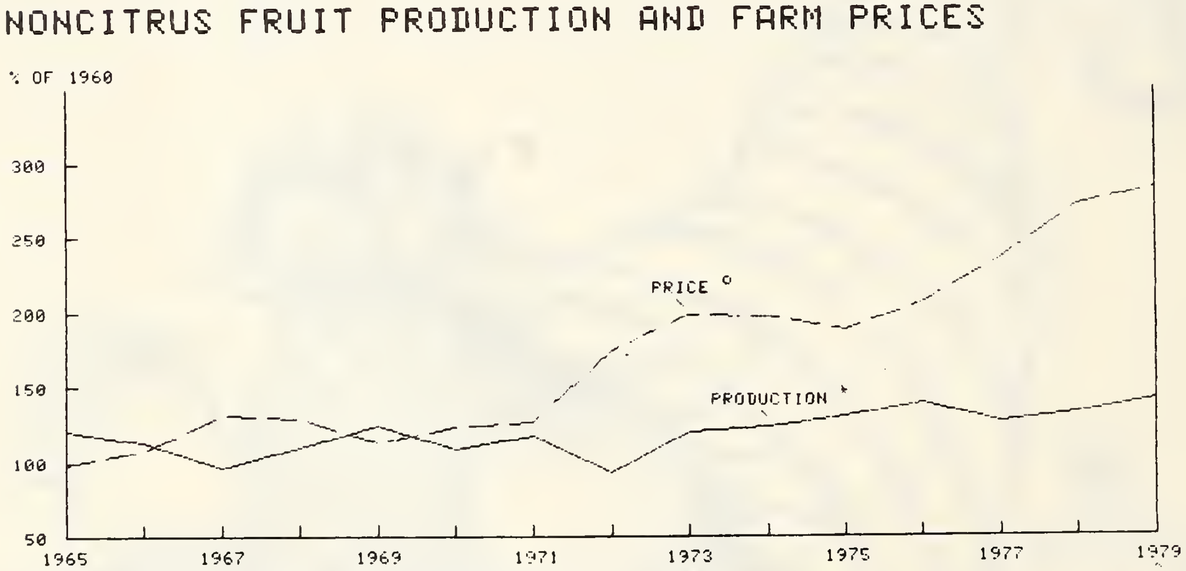


* INCLUDES PRODUCTION OF ALL CITRUS FRUITS. ° SEASON AVERAGE PRICE TO GROWERS.
PRICE WEIGHT BY PRODUCTION. ^ PRELIMINARY.

USDA NEG. ESS 2042-80 (10)



* 15 IMPORTANT FRUITS. ° SEASON AVERAGE PRICE TO GROWERS.
PRICE WEIGHT BY PRODUCTION. ^1979 PRELIMINARY.

USDA NEG. ESS 8485-80 (10)

THE FRUIT SITUATION

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SUMMARY

Ample Supplies of Fruit Keep Grower Prices Lower

October 1 prospects indicate that the 1980/81 season's citrus crop will be slightly above the record 1979/80 crop. Production of noncitrus fruit is also expected to total slightly larger than last year.

In response to seasonal declines in citrus supplies, September's index of prices received by growers for fresh and processing fruit advanced to 213 (1967=100), up 8.7 percent from August, but still 4.5 percent below a year earlier. Nevertheless, grower prices are expected to fall seasonally during the fourth quarter and stay below year-earlier levels, reflecting the larger supplies of both citrus and noncitrus. Although most retail fresh fruit prices will also decline seasonally during October-December, they will remain above last year because of the rising costs of marketing. Even so, relative to the retail prices of other foods, fruit will be a good buy.

The October 1 forecast of the citrus crop indicates a record 16.5 million short tons—Dominating the citrus scene is the prospect of another record orange crop, 276 million boxes, up 1 percent from last season's all-time high. Production in Florida, at 203 million boxes, is 2 percent below last season's record crop but still 24 percent above 1978/79. Prospective orange production in California is set at a record 65 million boxes, 9 percent more than last season. Production in Texas is expected to increase 39 percent from last season's small crop, but output in Arizona will probably be down 20 percent.

The grapefruit crop is forecast at 68.7 million boxes (including, California, desert valley fruit only), down 2 percent from last season. Smaller crops are expected for all producing areas except Texas. Florida's forecast of 53.0 million boxes is 3 percent less than last season. Crops in California and Arizona are expected to be down 10 and 3 percent, respectively. Texas production, at 9.0 million boxes, is up 14 percent.

The Arizona-California lemon crop is forecast at 25.9 million boxes, 25 percent larger than in 1979/80 and 32 percent larger than the year before. Crop prospects are up 13 percent for California and 39 percent for Arizona.

The record orange crop and relatively high juice yield likely from Florida oranges will result in larger output of most processed citrus items in 1980/81, particularly frozen concentrated orange juice (FCOJ). In addition, Florida packers will reduce the concentration of FCOJ brix to 43.4 degrees from 45.0 degrees effective at the start of the new packing season, and the change will lead to additional pack, with the expected larger carryover, total supplies of FCOJ will be large. F.o.b. prices of FCOJ have been weak and additional promotional allowances can be expected. Retail prices will probably drop, and stores likely will offer specials on FCOJ.

The 1980 noncitrus fruit crop, including 10 major fruits, is forecast at 13.0 million short tons, almost 2 percent above last year and 11 percent above the year before. The apple and grape crops are expected to set records and the pear crop is 3 percent above 1979. Despite the larger carryover of many processed fruit, processor utilization has been relatively good and is expected to continue so far the rest of the year, reflecting good demand both here and abroad. Still, noncitrus supplies available for the fresh market will be up, and grower prices of noncitrus for the fresh market are expected to average less than last year. Export demand is probably the key to apple prices.

The pack of most noncitrus fruit is expected to be above that of a year ago. With the larger carryover, total supplies of most processed noncitrus are expected to be larger. However, even with larger supplies, wholesale and retail prices may not decline, because contract prices for the fruit are higher and so are costs of processing and distribution. However, there will be occasional promotional price reductions to stimulate sales.

The total crop of domestic tree nuts (almonds, filberts, pecans, and walnuts) are estimated at 606,900 short tons (in-shell basis), 4 percent smaller than last year. The filbert and walnut crops are forecast to be larger by 8 and 6 percent, respectively, while the pecan crop will be 7 percent smaller. The almond crop is expected to be 10 percent below last year's record harvest. With demand likely to be favorable, prices for 1980 edible tree nuts will probably be firm.

RECENT DEVELOPMENTS AND OUTLOOK

GENERAL PRICE OUTLOOK

The average price received by growers for fresh and processing fruit advanced to 213 (1967 = 100) in September, up 8.7 percent from August, as supplies of grapefruit, oranges, peaches, and strawberries declined seasonally. However, the September figure is still 4.5 percent below a year ago. So far this year, prices received by growers have averaged almost 14 percent below year-earlier levels, mainly because of sharply lower citrus prices. The September prices for apples, pears, and strawberries were actually higher than last year. But, with larger supplies of apples and pears, in addition to a record large citrus crop in prospect, grower prices during the fourth quarter of 1980 are expected to decline from the current levels and remain lower than a year ago.

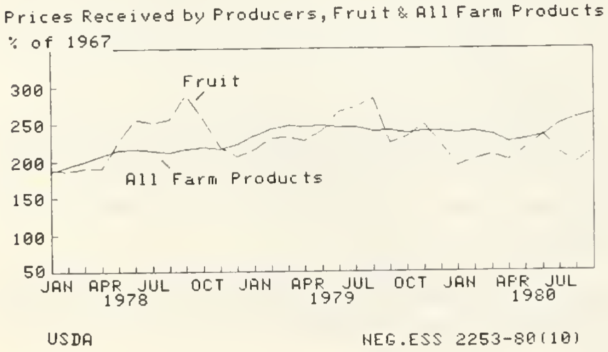


Table 1—Index of quarterly prices received by growers for fresh and processing fruit

Year	(1967=100)			
	1st	2nd	3rd	4th
1976 . . .	126	126	130	135
1977 . . .	143	151	159	200
1978 . . .	189	220	260	225
1979 . . .	226	244	258	233
1980 . . .	200	216	206	

Source: Agricultural Prices, CRB, ESS.

Marking the first decline this year, the Bureau of Labor Statistics (BLS) September Consumer Price Index (CPI-U) for fresh fruit (unadjusted) declined to 286.3 (1967 = 100) from 302.2 in August. The September figure is still 5.5 percent above a year ago, mainly reflecting the continued increase in costs of distribution and marketing. However, with the seasonal increase in supplies of fresh fruit, particularly apples and oranges, retail prices are expected to continue to decline in the fourth quarter. For the year 1980 the retail price index for fresh fruit is likely to average approximately 6 percent above 1979. This rate of increase is more moderate than recent years.

Despite larger supplies of processed fruit items, the CPI for processed fruit has increased steadily by less than many other foods. In September, it reached

Table 2—Quarterly consumer price indexes for fresh fruit

Year	(1967=100)			
	1st	2nd	3rd	4th
1976 . . .	146	161	170	166
1977 . . .	172	190	193	185
1978[1] . .	196	223		
1978[2] . .	194	222	247	221
1979 . . .	218	251	279	246
1980 . . .	238	265		

[1] From 1976-June 1978, these indexes were entitled Urban Wage Earners and Clerical Workers, BLS discontinued these indexes as of June 1978. [2] Starting with Jan. 1978 new index entitled All Urban Consumers, replaces previous index.

Source: Bureau of Labor Statistics. U.S. Department of Labor.

FRESH FRUIT: BLS CONSUMER PRICE INDEX

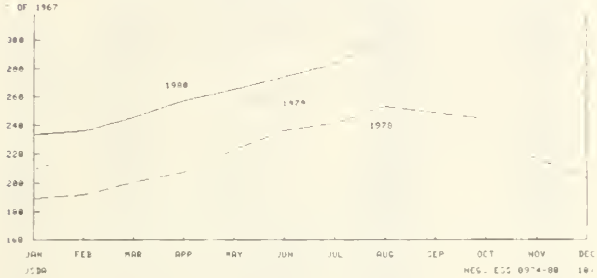


Table 3—Quarterly wholesale price indexes for canned fruit

Year	(1967=100)			
	1st	2nd	3rd	4th
1976 . . .	162.8	164.9	171.2	174.0
1977 . . .	175.4	179.0	179.6	181.8
1978 . . .	183.4	187.1	198.2	206.7
1979 . . .	210.8	214.4	218.5	222.7
1980 . . .	227.2	231.4	233.3	

Source: Bureau of Labor Statistics, U.S. Department of Labor.

127.4 (December 1977=100), up 5.7 percent from a year ago. Higher retail prices are mainly attributed to higher wholesale prices. In addition, costs of marketing and distribution have kept going up.

Even with larger supplies, wholesale prices of most processed fruit items are still above year-earlier levels. The September BLS wholesale price index for canned fruit was 233.7 (1967=100), down slightly from August, but still 6 percent higher than a year ago. Although supplies of most canned fruit will be larger, prices are expected to stay firm because of higher processing fruit contract prices and higher processing costs. Wholesale prices of canned fruit juice continued to advance in September after moderating in August. The canned juice index now is almost 6 percent higher than last year. However, wholesale prices of dried fruit, particularly raisins, and of frozen concentrated orange juice (FCOJ) have been lower because of abundant supplies. As supplies of these items are expected to remain ample, prices are likely to remain relatively steady.

FRESH CITRUS

A record citrus crop is indicated for the 1980/81 season. If realized, the new crop will be slightly larger than last season's record crop. Citrus production (California grapefruit production includes desert valley only) is forecast at 16.5 million tons, up from 16.4 million tons last season and 13.2 million tons in 1978/79. As of October 1, larger crops are indicated for oranges, lemons, and limes.

Oranges

Record Crop

October 1 prospects point to a record orange crop of 276 million boxes (10.8 million metric tons), 1 percent more than last season's crop and 31 percent larger than the 1978/79 harvest. The larger output is mostly due to a record California crop. The Texas crop in prospect is also larger, while orange production in Florida and Arizona is expected to be smaller than last season.

The forecast for Florida orange production is set at 203 million boxes, 2 percent below last season's record crop but still 24 percent above the 1978/79 season. Production of early and mid-season varieties in Florida is forecast at 115 million boxes, 2 percent smaller than last season. Valencia production is expected to be 88 million boxes, 1 percent less than last season. Most of the decrease was caused by the lack of rain during the summer; the drought made most new growth start hardening off. In addition, the bearing acreage of all oranges in Florida as of January 1, 1980, was 576,457 acres, slightly below the level of two years ago.

At 65 million boxes, the California crop is up 9 percent over last year. The navel crop is placed at 38 million boxes, 17 percent more than last year's record, while the Valencia forecast, at 27 million boxes, is the same as last year. Arizona producers expect to harvest 2.8 million boxes, 20 percent less than last season. The Texas crop, recovering from last year's freezes, is expected to be 5.6 million boxes, 39 percent above 1979/80 but still 12 percent below 1978/79.

U.S. prices to growers for fresh and processing oranges averaged $3.34 per box (equivalent on-tree

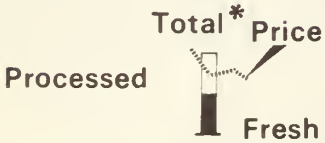
Table 4—Citrus fruit: Production, 1978/79, 1979/80, and indicated 1980/81[1]

Crop and State	Boxes			Ton equivalent		
	Utilized		1980/81	Utilized		1980/81
	1978/79	1979/80		1978/79	1979/80	
	1,000 boxes[2]			*1,000 short tons*		
Oranges:						
Early, Midseason and Navel varieties[3]:						
California	20,800	32,600	38,000	780	1,223	1,425
Florida	91,000	117,900	115,000	4,095	5,306	5,175
Texas	4,300	2,300	3,500	183	98	149
Arizona	700	850	800	26	32	30
Total	116,800	153,650	157,300	5,084	6,659	6,779
Valencias:						
California	16,500	27,000	27,000	619	1,012	1,013
Florida	73,000	88,800	88,000	3,285	3,996	3,960
Texas	2,100	1,730	2,100	89	73	89
Arizona	2,200	2,650	2,000	83	99	75
Total	93,800	120,180	119,100	4,076	5,180	5,137
All Oranges:						
California	37,300	59,600	65,000	1,399	2,235	2,438
Florida	164,000	206,700	203,000	7,380	9,302	9,135
Texas	6,400	4,030	5,600	272	171	238
Arizona	2,900	3,500	2,800	109	131	105
Total oranges	210,600	273,830	276,400	9,160	11,839	11,916
Grapefruit:						
Florida all	50,000	54,800	53,000	2,125	2,329	2,253
Seedless	42,700	46,900	45,000	1,815	1,993	1,913
Pink	13,300	15,800	15,000	565	671	638
White	29,400	31,100	30,000	1,250	1,322	1,275
Other	7,300	7,900	8,000	310	336	340
Texas	9,000	7,900	9,000	360	316	360
Arizona	2,250	3,000	2,900	72	96	93
California	6,130	7,500	---	200	245	---
Desert Valleys	3,260	4,200	3,800	104	134	122
Other areas[4]	2,870	3,300	---	96	111	---
Total grapefruit	67,380	73,200	---	2,757	2,986	---
Lemons:						
California	14,100	17,700	20,000	536	673	760
Arizona	5,500	3,050	5,900	209	116	224
Total lemons	19,600	20,750	25,900	745	789	984
Limes:						
Florida	720	1,100	1,200	29	44	48
Tangelos:						
Florida	4,200	6,400	5,200	189	288	234
Tangerines:						
Florida	3,500	3,900	3,900	166	185	185
Arizona	450	750	700	17	28	26
California	1,450	1,650	1,650	54	62	62
Total tangerines	5,400	6,300	6,250	237	275	273
Temples:						
Florida	4,700	6,000	5,700	212	270	257
Total[5]	312,600	387,580	389,350	13,329	16,491	16,540

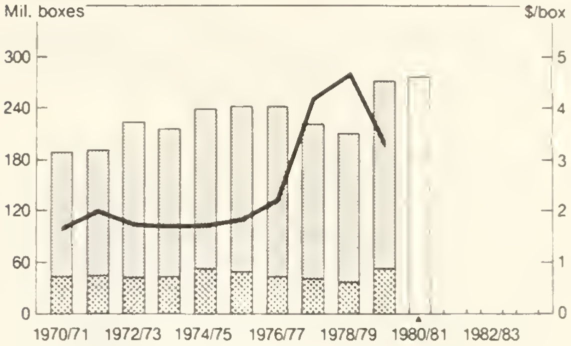
[1] The crop year begins with bloom of the first year shown and ends with completion of harvest the following year. [2] Net content of box varies. Approximate averages are as follows: Oranges-California and Arizona, 75 lbs.; Florida, 90 lbs.; Texas, 85 lbs.; Grapefruit-California, Desert Valleys, and Arizona, 64 lbs.; other California areas, 67, lbs.; Florida, 85, lbs.; Texas, 80 lbs.; Lemons, 76 lbs.; Limes 80 lbs.; Tangios, 90 lbs.; Tangerines-California and Arizona, 75 lbs; and Temples 90 lbs. [3] Navel and miscellaneous varieties in California and Arizona. Early and Misdeason varieties in Florida and Texas, including small quantities of Tangerines in Texas. [4] The first forecast for California grapefruit "Other areas" will be as of December 1, 1980. [5] Excludes California grapefruit in "Other areas."

Sources: Crop Production, CRB, ESS, and Florida Crop and Livestock Reporting Service.

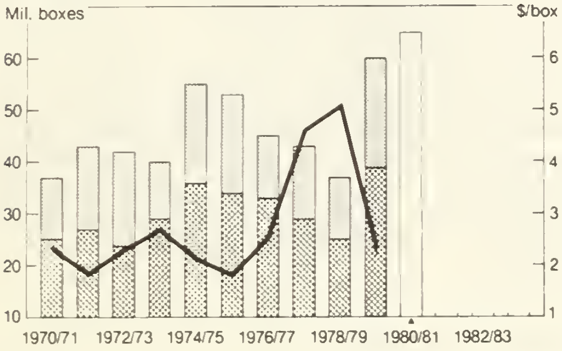
Oranges: Production, Utilization and Prices



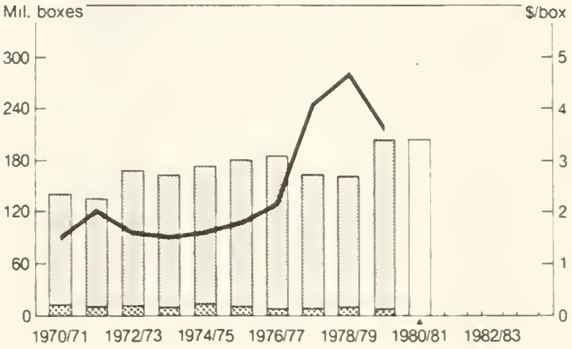
United States



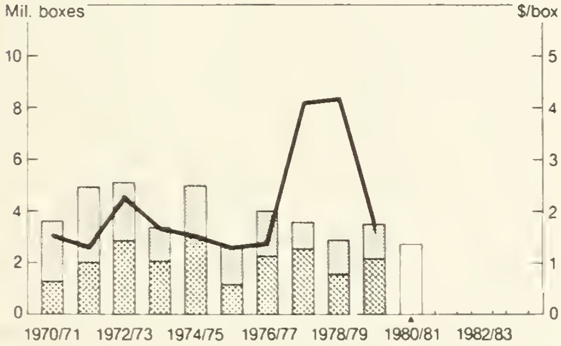
California



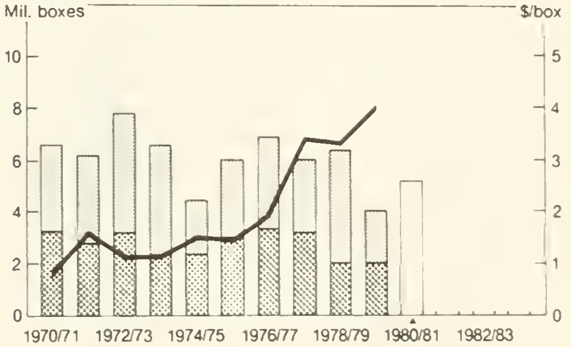
Florida



Arizona



Texas



Year beginning October

* Production having value.

△On-tree price to growers.

▲ 1980/81 data October 1, indication of total production.

returns) during the 1979/80 season, compared with $4.70 in 1978/79. Lower average orange prices were recorded for all producing areas except Texas, the decline primarily reflecting the record crop. However, the total value of all orange sales during 1979/80 was $1,304 million (equivalent packinghouse door prices), up 0.6 percent from 1978/79.

Export Demand Strong

Reflecting larger supplies and lower prices, export demand for fresh oranges has been strong. U.S. exports of fresh oranges and tangerines from November 1979 through August 1980 totaled 436,199 metric tons, 49 percent above the same period a year earlier. Increased shipments were recorded for almost all areas. Exports to Canada, our major customer, were up 23 percent and Hong Kong also purchased 48 percent more than a year earlier. With record orange production in the United States in prospect now, U.S. exports during 1980/81 could surpass the 1979/80 level.

Because of the record 1979/80 orange crop, imports of fresh oranges and tangerines during the first 8 months of 1980 totaled 11,018 metric tons, down 48 percent from last year. Mexico, our principal supplier, showed a decrease of 37 percent from last year, but its share of total U.S. orange and tangerine imports increased to 97 percent from 80 percent in 1978. Shipments from Israel were also down 94 percent. With another record orange crop in prospect, U.S. imports will remain relatively low.

Market Prospects

Fresh orange prices at both farm and retail levels so far have been substantially below year-earlier levels. U.S. prices to growers for fresh oranges averaged $4.50 a box (equivalent on-tree returns) in September, down 24 percent from a year earlier. The record crop prospects for 1980/81, combined with expected larger carryover stocks of most processed items, especially frozen concentrated orange juice, will cause prices to remain weak. Prices of fresh oranges will be lower than last year barring a freeze in view of substantially larger supplies of California navel oranges and a record apple crop. Current orange market prospects through the winter point to grower prices remaining below year-earlier levels. Retail prices will also remain lower.

Grapefruit

Slightly Smaller Supplies

Prospects for U.S. grapefruit production during the 1980/81 season (for California, only desert valley fruit included) point to a crop of 68.7 million boxes (2.57 million metric tons), 2 percent less than last season but 6 percent more than the 1978/79 season. Smaller crops are currently expected for all producing areas except Texas.

Florida's grapefruit crop is forecast at 53 million boxes, 3 percent less than last season. However, bearing acreage in Florida increased 5 percent—from 120,310 acres on January 1, 1978, to 126,329 on January 1, 1980. The Arizona crop, at 2.9 million boxes, is 3 percent less than in 1979/80. The crop in California desert areas is forecast at 3.8 million boxes, down 10 percent. Texas growers expect to harvest 9 million boxes, 14 percent more than last season's small crop.

Exports Down Slightly

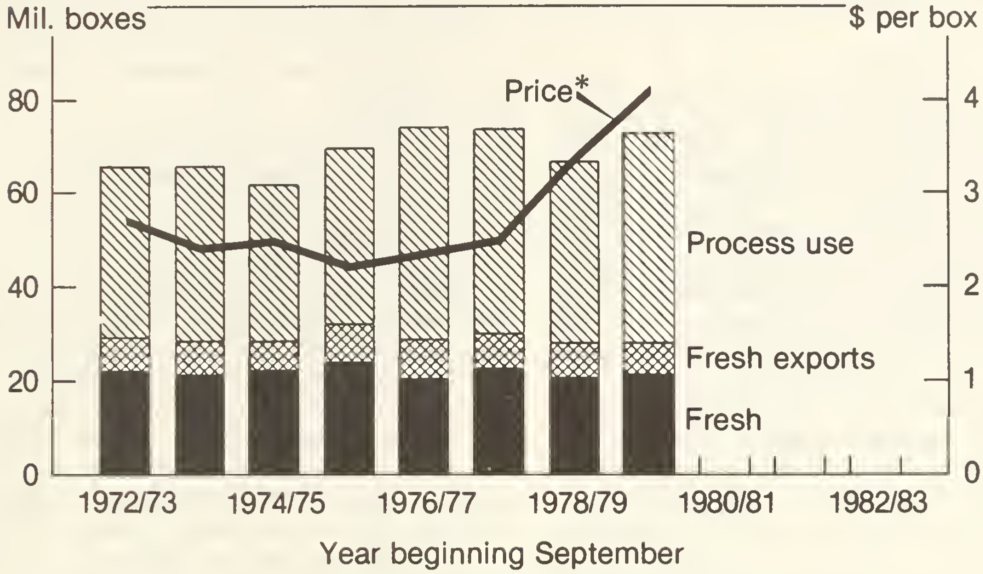
Export demand for fresh grapefruit weakened slightly last season. For the 1979/80 season, total exports amounted to 271,436 metric tons, down 3 percent from the previous year. An 18-percent decrease in shipments to Japan, our largest customer, was chiefly responsible. Exports to other major areas around the world have been strong, with increases of 17 percent recorded for Canada and 16 percent for Europe. The recent gain in the Japanese yen relative to U.S. dollars could enhance grapefruit exports to that market during the coming season. The export market is of vital importance to domestic growers.

Market Prospects

Carryover stocks of most processed grapefruit products are up going into the 1980/81 season. Sale of both chilled and frozen concentrated grapefruit juices have shown good growth in recent years. Thus, processor demand is expected to be relatively good despite larger stocks. The smaller crop and relatively good processor demand in prospect, combined with a possibly good export market, may keep grapefruit prices firm. However, the record orange crop could exert some downward pressure on grapefruit prices. Because of good processor demand, grower prices for Florida grapefruit for all uses averaged $3.26 a box (equivalent on-tree returns) in 1979/80, compared with $2.41 in 1978/79. In response to the sharply smaller crop, on-tree returns for Texas grapefruit for all uses more than doubled from the preceeding season. Consequently, the average U.S. price for all grapefruit for 1979/80—$2.97 per box (equivalent on-tree returns)—was up 26 percent from 1978/79. The total value of U.S. grapefruit was $300 million, compared with $232 million in 1978/79.

Because of a larger crop, shipments of grapefruit from Texas were considerably ahead of last year's pace through mid-October. Opening f.o.b. prices for Texas grapefruit were sharply lower than a year ear-

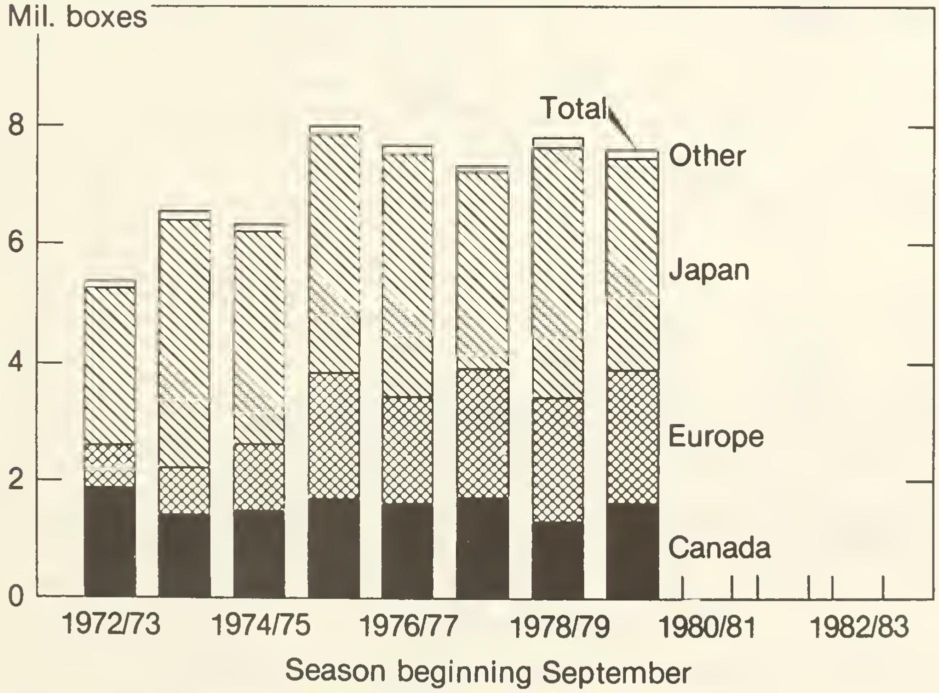
U.S. Grapefruit Production, Use, and Prices



*Season average packinghouse-door returns. Crop Reporting Board and Bureau of Census

USDA Neg. ESS 162-80 (10)

U.S. Exports of Fresh Grapefruit



USDA Neg. ESS 852-80 (10)

lier. Prices many decline further with increased volumes and are expected to remain below year-earlier levels through the mid-winter.

Lemons

Sharply Larger Lemon Crop

The Arizona-California lemon crop is forecast at 25.9 million boxes (893,000 metric tons), 25 percent above last year's crop, and 32 percent larger than the 1978/79 crop. California's crop, at 20 million boxes, is up 13 percent from 1979/80. In Arizona, a crop of 5.9 million boxes is expected, 93 percent greater than the small crop of 3.05 million boxes harvested last season and 7 percent above the 1978/79 crop. Fruit set is heavy and quality is excellent.

Because of the larger crop, total movement through mid-October was sharply ahead of last season's pace, primarily reflecting the sharp increase in processing use. Deliveries to the fresh market have also been substanially larger, while shipments to export market were only slightly above last season's pace. In response to a larger crop, f.o.b. prices for fresh lemons were quoted at $9.78 a carton in mid-October, compared with $11.92 a year earlier. So far this season, lemon prices have averaged 36 percent below a year earlier.

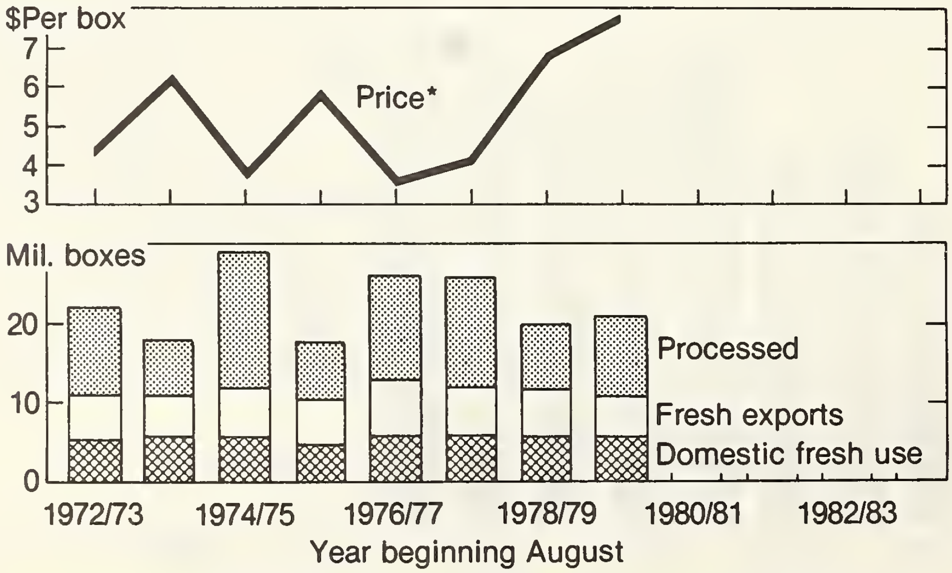
The 1979/80 season average price received by growers for all uses of lemons was $4.81 a box (equivalent on-tree returns), 4 percent higher than 1978/79, with higher prices reported for both fresh and processing uses. In view of the sharply larger crop, lemon prices are expected to average lower than in 1979/80.

Other Citrus Fruit

Sharply Smaller Tangelo Crop

Output of Florida tangelos is expected to total 5.20 million boxes (212,000 metric tons), 19 percent less than the 1979/80 crop but 24 percent more than 1978/79 production. More of the tangelo crop usually goes to processing outlets than to fresh market. Because of a sharply larger crop, processing use during the 1979/80 season was up 85 percent from the previous season, while shipments to fresh market outlets were only moderately larger. Consequently, 72 percent of the crop was processed, compared with 59 percent during the 1978/79 season. The larger crop also depressed grower prices of processeing tangelos. On-tree returns for processing tangelos

U.S. Lemon Production, Use and Prices



*Season average packing house door returns. Crop Reporting Board and Bureau of Census.

USDA Neg. ESS 5822-80(10)

averaged 47 percent below 1978/79, while those for fresh market averaged only 4 percent lower. Thus, the season average price for all sales was $2.56 a box in 1979/80, compared with $3.90 a year earlier. Prices this season will probably average moderately higher because of the sharply smaller crop.

Slightly Smaller Tangerine Crop

The first forecast of tangerines is placed at 6.25 million boxes (248,000 metric tons), 1 percent less than last season, the drop due entirely to a smaller Arizona crop. Both California and Florida expect the same crops as last season—1.65 and 3.90 million boxes respectively. Arizona growers expect to harvest 700,000 boxes, 7 percent less than during 1978/79.

Tangerines are predominately a fresh market crop. Even with a substantially larger crop, the proportion of tangerines for fresh use during 1979/80 remained at 57 percent, the same as the preceeding season, mainly reflecting the sharply reduced utilization of the California crop for fresh market.

Because of sharply lower prices of California and Arizona tangerines for the fresh market, the season average price received by growers for all uses in 1979/80 was $3.36 a box (equivalent on-tree returns), 44 percent below the previous season. Prices are expected to remain low this season because of the record orange crop.

Moderately Smaller Temple Crop

Florida's Temple crop is forecast at 5.7 million boxes (233,000 metric tons), 5 percent below last season. More Temples are normally processed than are sold for fresh. However, even with a sharply larger 1979/80 crop, the proportion of Temples for processing use remained at 54 percent, the same as a year ago. The season average return for all uses was $2.54 a box (equivalent on-tree returns), just about half of the previous season's returns. Prices for fresh use were down 45 percent, while those for processing use were 52 percent lower. Prices are not expected to increase appreciably this season.

PROCESSED CITRUS

Sharp Increases in Both Fresh And Processing Uses

Because of the record 1979/80 citrus crop, the amount for processing use totaled 12.4 million tons, up 27 percent from 1978/79. Processing use also increased its share of total production to 75 percent compared with 73.4 percent during 1978/79. Oranges' share of the total crop used for processing increased from 78 percent in 1978/79 to 82 percent in 1979/80, reflecting the record 1979/80 orange crop. Likewise, 61 percent of grapefruit sold in 1979/80 was processed, up from 58 percent in 1978/79. Lemons for processing use increased sharply from 39 percent of the total crop in 1978/79 to 48 percent in 1979/80.

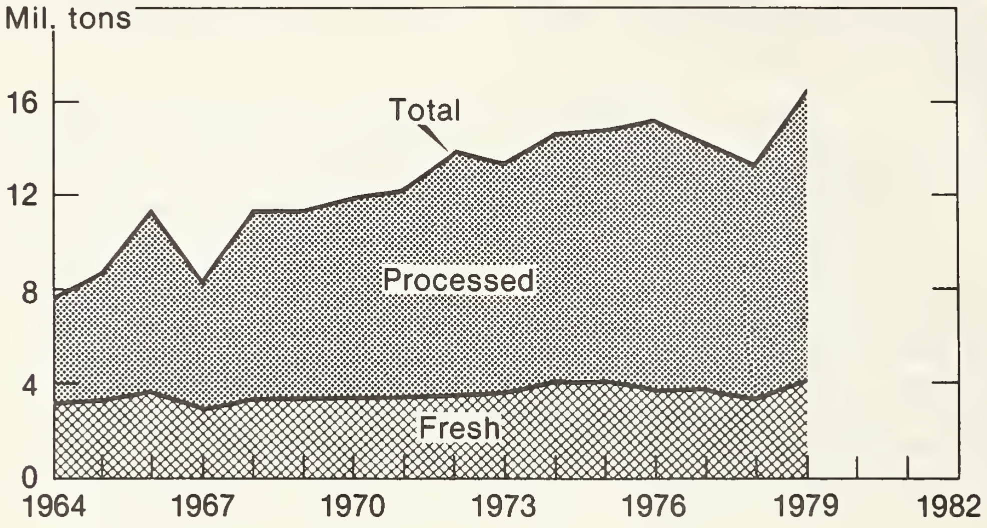
Florida oranges used for processing amounted to 195.7 million boxes, an increase of 29 percent from 1978/79. Processing oranges accounted for 95 percent of the Florida crop. On the other hand, because of the sharply larger supply of California oranges available, Florida oranges sold for fresh declined 6 percent from 1978/79. Florida oranges used for processing increased for all outlets except chilled sections and salads. Including tangelos, Temples, tangerines, and K-early citrus the percentage of the Florida oranges processed for frozen concentrated orange juice moved up to 85 percent of total Florida processing oranges from 81.5 percent in 1978/79. As a result, even with the larger quantities of oranges used for chilled juice and all other canned items, these other processing uses (including cannery juice, blend, sections, and salads) declined in relative terms.

In response to good demand for processed grapefruit products, fresh use of Florida grapefruit declined slightly. Consequently, grapefruit sold fresh declined to 36 percent of the total use, compared with 40 percent during 1978/79. The marked increase in grapefruit used for frozen concentrated juice contributed the most to the jump in processing use. The share of grapefruit used for chilled products also increased, while the share used for canned items continued to go down, comprising, 35 percent of total processing grapefruit, compared to 43 percent a year ago.

With the sharply larger crop in California in 1979/80, oranges sold for both fresh and processing use increased sharply from a year earlier. However, the share of oranges sold for fresh declined slightly, primarily because of some quality problems. Although more lemons are sold for fresh use than for processing use, fresh use declined in both absolute and relative terms from 1978/79. A smaller quantity of lemons was sold for fresh use primarily because of sharply decreased shipments abroad. Exports accounted for only 22 percent of the 1979/80 crop, compared with 30 percent a year ago.

Because of the sharply smaller Texas citrus crop in 1979/80, processing use was down sharply for both oranges and grapefruit. Slightly more than 48 percent of the oranges were processed, while only 47

Citrus Fruit Production and Utilization



Beginning crop year indicated.

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Table 5—Oranges and grapefruit processed, Florida 1975/76 through 1979/80

Crop and season	Frozen concentrates	Chilled products		Other processes[2]	Total processed
		Juice	Sections and salads		
	1,000 boxes				
Oranges:[1]					
1977/78	132,222	25,345	382	8,077	166,026
1978/79	130,183	22,793	315	6,525	159,816
1979/80	174,883	24,424	309	6,961	206,577
Grapefruit					
1977/78	13,999	4,363	917	14,083	33,362
1978/79	13,276	3,162	771	13,001	30.210
1979/80	18,506	3,591	801	12,401	35,299

[1] Includes tangelos, Temples, tangerines and K-early citrus. [2] Includes cannery juice, blend sections and salads.

Source: Citrus production and utilization report, CRB, ESS.

percent of grapefruit were processed, down from 56 percent in 1978/79.

Larger Carryover of Frozen Concentrates Expected

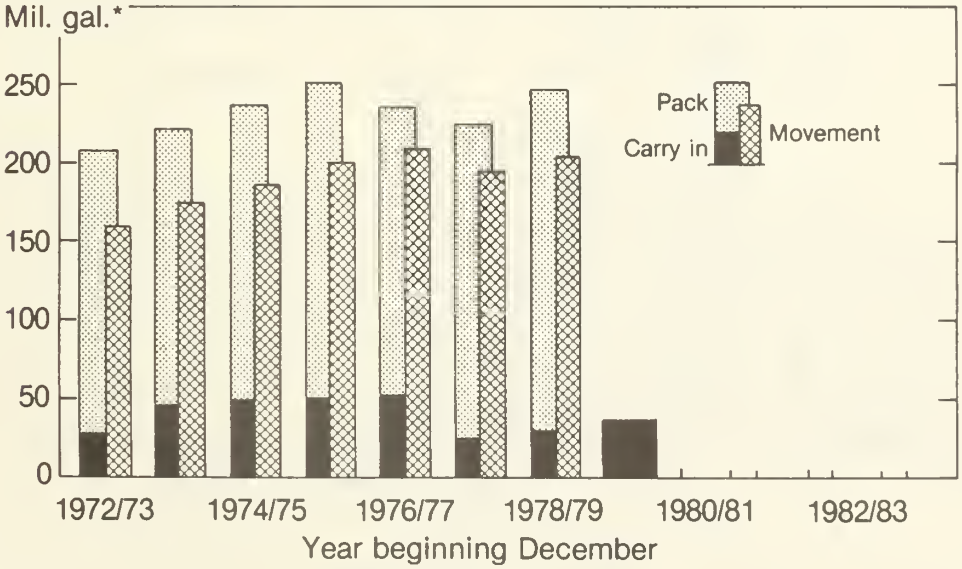
The record orange crop in Florida resulted in a record pack of frozen concentrated orange juice for the 1979/80 season. The total pack reached 231.1 million gallons (excluding reprocessed gallons), up almost 34 percent from last season. Thus, despite sharply smaller imports, the total supply of FCOJ during 1979/80 is almost 20 percent larger.

Because of larger supplies, Florida citrus packers have had several promotional allowances to reduce f.o.b. prices for FCOJ. The lowest level, $2.80 per dozen 6-ounce can (f.o.b. Florida canneries), was offered in early June. The current price is quoted at $3.25. During the promotional allowance, movement improved considerably. However, sales, although up, have not kept pace with processing, so as of October 11 the stocks on hand were 79.4 million gallons, up 32 percent from a year ago. It appears that carryover will approach 50 to 60 million gallons, compared with 37.4 million last season. Thus, the combination of a relatively large Florida orange crop in prospect and larger carryover could weaken prices of FCOJ somewhat.

According to the Florida Citrus Processor Association, export shipment of FCOJ through October 11 totaled 9.7 million gallons, down slightly from a year ago. More than half has been shipped to Canada. With a larger supply and lower prices, exports are expected to increase during the 1980/81 season.

In response to good demand, the 1979/80 Florida pack of frozen concentrated grapefruit juice (FCGJ) reached a record 19.4 million gallons (excluding reprocessed gallons), up 37 percent from 1978/79. With a smaller carryover at the beginning of the season, the total supply of FCGJ is only 17 percent larger, though. Even with higher prices, movement so far this season has been running moderately ahead of last season's pace. The f.o.b. price for Florida FCGJ is quoted at $3.33 per dozen 6-ounce cans, compared with $2.80-$2.85 a year ago. However, sales have not kept pace with processing—leaving the stocks on hand at 6.5 million gallons as of October 11, up 58 percent from the corresponding period a year ago. With another relatively large crop in prospect, the total supply of FCGJ will be larger during 1980/81 than during 1979/80. Thus, FCGJ prices can be expected to ease.

Florida Supply and Movement of Frozen Orange Juice Concentrate



*45° Brix ^Includes imports Florida Citrus Processors Association

USDA Neg. ESS 5713-80(10)

Larger Pack of Chilled Citrus Juice

In a continuation of the uptrend, Florida packers processed another record high: 234.8 million gallons of chilled orange juice (excluding single-strength reprocessed), 14 percent more than in the 1978/79 season. At the same time, total movement also set a record of 233.8 million gallons, also up 14 percent from last season. The large increase is recorded for domestic movement, while exports so far have been up only 4 percent from a year ago. With carryover at the beginning of the season near the previous season's level, the larger pack more than offset larger movement, leaving the carryover at the end of the season moderately above year-earlier levels.

Florida's pack of chilled grapefruit juice for 1979/80 also set a record of 28.7 million gallons (excluding single-strength reprocessed), up 6 percent from last season. Movement was near last season's level, but because of a larger pack, the stocks on hand at the end of the season amounted to 2.8 million gallons, 91 percent larger than last season.

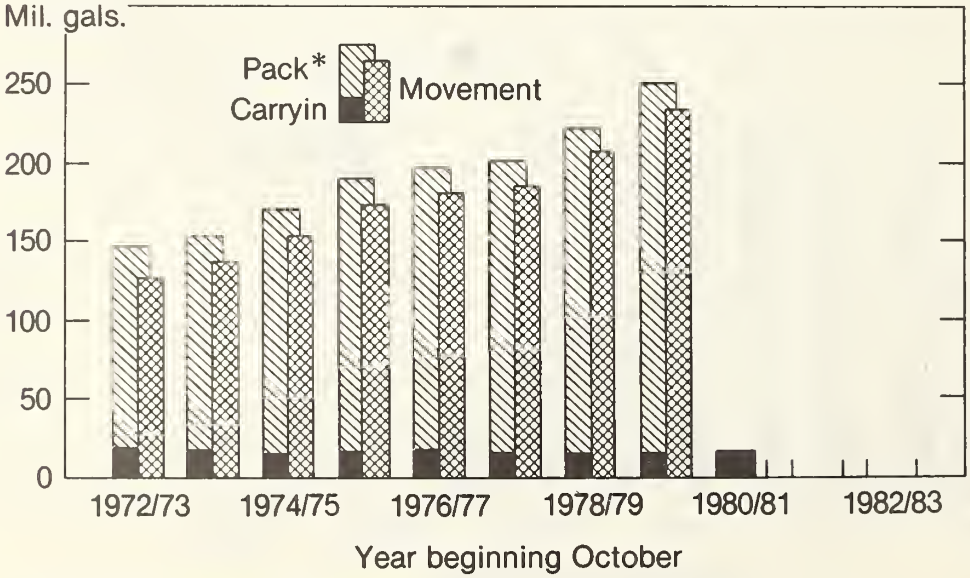
Canned Citrus

The pack of canned citrus products continued to increase, totaling 33.9 million cases (24-2's) in 1979/80, up 2 percent from the previous season. However, movement was down slightly, primarily because of a moderate decrease in sales of canned grapefruit juice. Higher prices have contributed to the slackening movement. Furthermore, consumer preference has shifted to chilled and frozen concentrated grapefruit juice. Because of the slackening movement, both Florida and Texas citrus packers gave promotional allowances to reduce f.o.b. prices for canned grapefruit juice. Generally, though, f.o.b. prices were higher throughout the season than in the previous season. The current f.o.b. prices for Florida canned grapefruit juice are quoted at $7.50-$7.60 per case (1 dozen-46 ounce), compared with $6.25 a year ago. The f.o.b. price for Texas canned grapefruit juice is currently quoted at $8.25 per case (1 dozen-46 ounce).

In contrast, movement of canned orange juice increased moderately during the 1979/80 season. The increased movement is mostly attributed to good foreign demand, as U.S. exports of canned single-strength juice during the first 10 months of 1979/80 increased 16 percent from the corresponding period a year earlier. F.o.b. prices of Florida canned orange juice have been steady this season, except during promotions. The current price is quoted at $8.00 per case (unsweetened, 1 dozen 46-ounce cans, f.o.b. Florida canneries), the same as a year ago.

The larger pack and slackening movement have resulted in substantially larger carryover stocks of

Florida Supply and Movement of Chilled Orange Juice



*Excluded single-strength reprocessed. Florida Citrus Processors Association.

USDA Neg. ESS 2456-80 (10)

canned citrus products this season, even with a moderately smaller carryover at the season's beginning.

In view of the relatively large Florida crop prospects for the total pack of canned citrus products is not expected to decline appreciably. Thus, with the larger carryover at the beginning of the 1980/81 season, the total supply of canned citrus products will remain large. Prices are expected to weaken somewhat.

FRESH NONCITRUS

The 1980 noncitrus fruit crop is forecast at 13.0 million tons, 2.3 percent above last year and 11 percent larger than 1978. Larger crops of apples, grapes, and prunes and plums are primarily responsible. Shipping-point prices for most fresh noncitrus fruit have declined below a year ago. Available supplies this fall and winter will be ample, since there are larger stocks of most processed fruit and processor demand is not expected to be strong. Thus, prices may stay lower than a year ago.

Table 6—U.S. noncitrus fruit: Total production, 1978, 1979, and indicated 1980

Crop	1978	1979	1980
	1,000 tons		
Apples	3,804	4,045	4,160
Apricots	126	145	124
Cherries, sweet	155	184	164
Cherries, tart	91	85	113
Cranberries	124	124	128
Grapes	4,567	4,989	5,073
Nectarines	148	172	185
Peaches	1,348	1,489	1,454
Pears	727	862	888
Prunes and plums	634	655	757
Total	11,724	12,750	13,046

Source: Crop Production, CRB, ESS.

Apples

Record Crop

The final forecast of the 1980 U.S. apple crop is a record 8.32 billion pounds (3.77 million metric tons). This is 3 percent above the record 1979 total. After August 1, prospects improved slightly in the Western States but declined in the Eastern States. In the Central States, prospects are about the same as on August 1. The following table shows the 1980 apple crop by regions, compared with apple production in 1979 and 1978.

Table 7—Apples: Regional production, 1978, 1979, and indicated 1980

Area	1978[1]	1979[1]	Indicated 1980
	Billion pounds		
East	3.19	3.28	3.30
Central States	1.40	1.19	1.46
West	3.01	3.62	3.56
Total U.S.	7.60	8.09	8.32

[1] Includes unharvested production and excess cullage (million pounds): United States 1978-53.2, 1979-25.6.

Source: Crop Production, CRB, ESS.

The Eastern States expect a crop of 3.29 billion pounds, slightly above last year, with production showing a mixed pattern. New York, the leading apple State in this region, expects a crop of 1,070 million pounds, up 3 percent from 1979. At 570 million pounds, apple production in Pennsylvania, the second largest apple State in the East, is 6.5 percent larger than in 1979. Virginia's 390 million pounds are 17 percent below last year. In the Central States, prospects are for a crop of 1.46 billion pounds, 23 percent above last year's production. Larger crops from Michigan and Ohio are chiefly responsible. Michigan apple growers expect to harvest the second largest crop of this century, while the Ohio crop, at 170 million pounds, is 62 percent larger than last year. The Western region now expects a crop of 3.56 billion pounds, 2 percent below the 1979 harvest. A 13 percent decrease in the California crop is primarily responsible. Washington, the leading apple producing State in the nation, expects a record 2.6 billion pounds, up almost 2 percent from 1979.

Market Prospects and Prices

Because of the record crop, shipments of fresh apples are running moderately ahead of last year's pace. Supplies of apples for fresh market are expected to be ample this season, since processors have substantially larger inventories of processed apple products and will not bid for apples aggressively this year.

In general, opening f.o.b. prices for fresh apples at major shipping points were moderately to substantially higher than a year ago, but they have declined with increased volume. In mid-October, prices at several shipping points were below year-earlier levels. As supplies continue to increase this fall, weakening processor demand and the larger fresh supply available from Eastern and Central States will dampen apple prices. Furthermore, the record orange crop in prospect particularly from California, will

Table 8—Red Delicious Apples: Shipping point prices, selected regions, 1979 and 1980

Shipping points	Mid-October F.O.B. prices		Units
	1979	1980	
Western Michigan . . .	6.75	5.75	Per carton, U.S. Fancy, 2¼" up, 12-3 lb. film bags.
Appalachian District. . . .	8.50	6.00	U.S. Comb. Extra Fancy and Fancy, tray pack, 88-113's
Yakima Valley, Washington .	9.25	8.00	Per carton, tray pack, Wash., State Extra Fancy, 80-113's

Source: F.O.B. prices, AMS.

exert some additional downward pressure on apple prices. Also, with a record apple crop from Washington, grower prices later in the season are expected to be below the unusually high levels attained last season. However, export demand will be the key to apple prices this season. If export demand continues to be good, prices received by apple growers may hold relatively firm.

The outlook for export demand for all apples is mixed this season. Apple production in Western Europe for 1980 is expected to be nearly 5 percent smaller than last year. The two key exporting countries are France and Italy. France expects a 5 percent larger crop, while the Italian crop will be 1 percent smaller than last year. However, production in West Germany, a key importing country on the continent, is down 9 percent from last year's large harvest. On the other hand, prospects in Canada, an important destination, are not bright for U.S. growers because the Canadian apple crop is expected to increase 7 percent from 1979. However, exports to the Mideast and Latin America still look very encouraging, while the markets in the Far East may not be as strong as last season.

Exports of apples (mostly old crop) during the first 2 months of the 1980/81 season (July and August) increased moderately. Shipments to European markets continued strong, up 46 percent from a year ago. A sharp increase was also recorded for the secondary markets, such as the Far East, Mideast, East, and Latin America. However, Canada and Hong Kong have purchased less than a year earlier.

Prices for processing apples have been negotiated below the high levels of last season. Offering prices are considerably lower in all producing areas. The majority of the apple processors in Michigan have agreed to pay $5.00-$5.50 per cwt. for processing variety apples (U.S. No. 1 canner grade, 2-1/2 inches and up, delivered to processors), compared with $6.15-$7.50 a year ago. In California, apple processors are paying $90 per short ton, f.o.b. packinghouse, for all varieties except Red and Standard Delicious, 2-3/8 inches and larger. The price was $170 last year. In the East, apples for processing use are also offered at a substantially lower price—$5.75 per cwt. in Virginia and West Virginia for U.S. No. 1 grade, 2-3/4 inches and up.

Avocados

Record Crop From Florida

The 1980/81 season forecast of Florida avocados for certified shipments is a record 1.1 million bushels, up 8 percent from last season, but only slightly more the shipments during 1975/76. Much of the increase is from new acreage coming into production. The total bearing acreage, at 8,800 acres, is up 10 percent from 1979/80.

Because of the larger crop, shipments of Florida avocados through September 29 totaled 488,800 bushels, substantially above last year. As supplies of California avocados have been smaller this season, the f.o.b. prices for Florida avocados have been firm. In mid-October, shipping point prices for Florida avocados, Greenskin varieties, size 8-16, were quoted at $6.75 a flat, compared with $4.25 a year earlier. Prices are expected to decline with increased shipments. In addition, the perspective larger supply of 1980/81 California avocados will likely weaken the prices further.

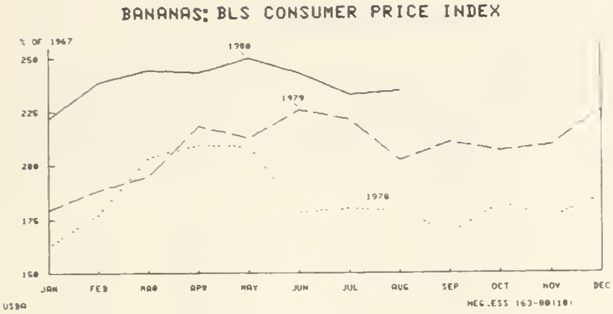
The estimate of California avocado production for the 1979/80 season remains at 2.78 million bushels. This is the smallest crop in several seasons. By early October, only a small quantity of avocados remained to be harvested. Prospects for the 1980/81 season, which begins November 1, remain excellent, according to trade sources.

Bananas

Slightly Smaller Imports

U.S. imports of bananas during the first 8 months of 1980 totaled 1.5 million metric tons, slightly below last year's levels. Most principal suppliers showed increases, but moderately to sharply lower imports from Honduras and Panama were offsetting. Although U.S. imports from Honduras declined almost 9 percent, it is still our top supplier, accounting for 26 percent of the total imported. Ecuador continues to be the second major source, with imports up slightly from last year. The relatively larger increases in imports were recorded for Colombia and Guatemala, up 20 and 22 percent respectively.

Wholesale prices of bananas reached a record high $8.06 per 40-lb. box last May. The September price of $6.40 was up 17 percent from a year earlier. Retail



prices of bananas generally follow wholesale prices, and also reached a record high of 249.7 (1967=100) in May. Because of the competition provided by large supplies of summer fruit, though, retail prices declined in June and July. The September retail price index of bananas stood at 238, up about 13 percent from last year. However, with large supplies of apples and oranges, retail banana prices are not expected to increase appreciably, but will remain above year-earlier levels.

Cherries

Smaller Sweet Cherry Crop

The 1980 U.S. sweet cherry crop totaled 164,000 short tons (149,000 metric tons), 11 percent below the 1979 record crop, but still 6 percent larger than 1978. Smaller output was reported for all Western States except California and Idaho. Washington, the leading producing State, had a crop of 33 percent smaller than the record production of 1979. The State's share of the total crop declined to 27 percent in 1980 from 37 percent in 1979. California, the second largest State, produced 43,500 short tons, an increase of 27 percent from a year ago. In Oregon, the crop totaled 32,000 short tons, off 16 percent from 1979. All together, these three States produced 73 percent of the total crop, compared with 76 percent in 1979. Production in the Great Lake States was up 9 percent from 1979. Michigan, the leading Great Lakes producer, had a crop 7 percent larger.

Because of the smaller crop and an expanded export market, prices received by growers for the 1980 sweet cherries averaged $649 per short ton, 8 percent above a year ago. Higher prices were recorded for most Western States, while prices for the Lake States were generally lower. However, the total 1980 crop was valued at $106.3 million, still almost 4 percent below 1979.

Even with a substantially smaller crop, shipments of sweet cherries to fresh markets were near last year's level. Shipments to processors decreased substantially, reflecting primarily a sharp reduction in use of sweet cherries for brining. The following table shows the utilization of the U.S. sweet cherry crop during the last 5 years.

Sharply Larger Tart Cherry Output

The U.S. production of tart cherries totaled 226 million pounds (103,000 metric tons) in 1980, 33 percent more than in 1979 and 25 percent more than in 1978. It was the largest crop since 1975. Michigan, the leading State, with an increase of 58 percent, contributed most to the total increase. The four Great Lake States produced 91 percent of the total, or 206 million pounds, up 39 percent from 1979.

In response to the sharply larger crop and larger stocks of canned and frozen tart cherries, grower prices for the 1980 tart cherry crop averaged 19.3 cents per pound, compared with 47.2 cents a year ago. Consequently, the total crop was valued at $41.2 million, only about half of last year's crop value. The following table shows the utilization of tart cherries during the last 5 years.

Table 9—Sweet cherries: Production, utilization, price, and value, 1976-80 crops

Crop	Production[1]		Utilization				Price per ton	Value of utilized production
	Total	Utilized[2]	Fresh	Processed (fresh equivalent)				
				Canned	Brined	Other[3]		
	1,000 short tons						*Dol.*	*Thou. dol.*
1976	172.9	167.7	95.1	11.2	51.4	10.0	402	67,474
1977	147.8	146.5	72.4	10.5	52.1	11.5	496	72,686
1978	155.0	155.0	67.3	12.8	59.6	15.3	692	107,307
1979	183.6	183.5	85.4	14.9	75.1	8.1	601	110,297
1980	164.3	163.8	84.6	18.1	53.8	7.2	649	106,335

[1] Difference between total and utilized is excess cullage and quantities not harvested for economic reasons. [2] Some totals do not add due to rounding. [3] Includes frozen, juice, jelly, etc.

Source: Crop Production, CRB, ESS.

Table 10—Tart cherries: Production, utilization, price, and value, 1976-80 crops

Crop	Production[1]		Utilization				Price per ton	Value of utilized production
	Total	Utilized[2]	Fresh	Processed (fresh equivalent)				
				Canned	Frozen	Other[3]		
	1,000 short tons						*Dol.*	*Thou. dollars*
1976	73.3	73.3	3.0	18.6	49.1	2.6	502	36,806
1977	105.4	105.4	3.1	30.1	69.6	2.6	588	61,949
1978	90.6	90.6	2.5	23.8	63.2	1.2	876	79,334
1979	85.2	85.2	2.2	23.0	58.2	2.0	944	80,505
1980	113.1	106.6	3.2	29.6	72.2	1.7	386	41,154

[1] Difference between total and utilized is excess cullage and quantities not harvested for economic reasons. [2] Some totals do not add due to rounding. [3] Includes juices, wine, jam, etc.

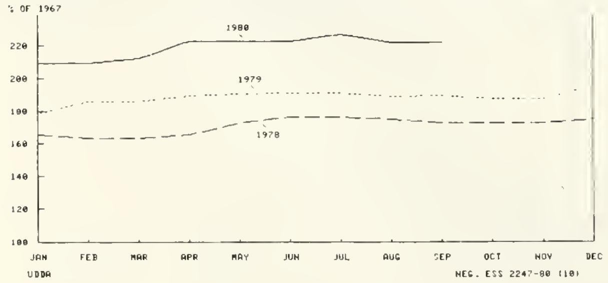
Source: Crop Production, CRB, ESS.

Cranberries

The 1980 cranberry crop is expected to be a record 2.56 million barrels (116,000 metric tons), up 3 percent from the August forecast and 3 percent larger than the 1979 crop. A record crop of 1.01 million barrels expected from Wisconsin is chiefly responsible for the increase. Massachusetts, the leading producing State, expects a crop of 1.1 million barrels, the same as a year ago. Reductions from a year ago are expected in New Jersey and Washington, while Oregon's crop is expected to be slightly larger.

Season opening prices for fresh Massachusetts cranberries in Chicago wholesale markets were sharply higher than a year earlier. They are expected to decline as the season progresses.

CANNED CRANBERRY SAUCE: BLS WHOLESALE PRICE INDEX



F.o.b. prices for canned cranberry sauce have been considerably above year-earlier levels. The BLS wholesale price index for canned cranberry sauce (No. 300 can) averaged 221.7 (1967=100) for September 1980, 17 percent above a year ago. Prices are likely to remain higher in view of higher costs of processing and berries.

Grapes

Record Crop

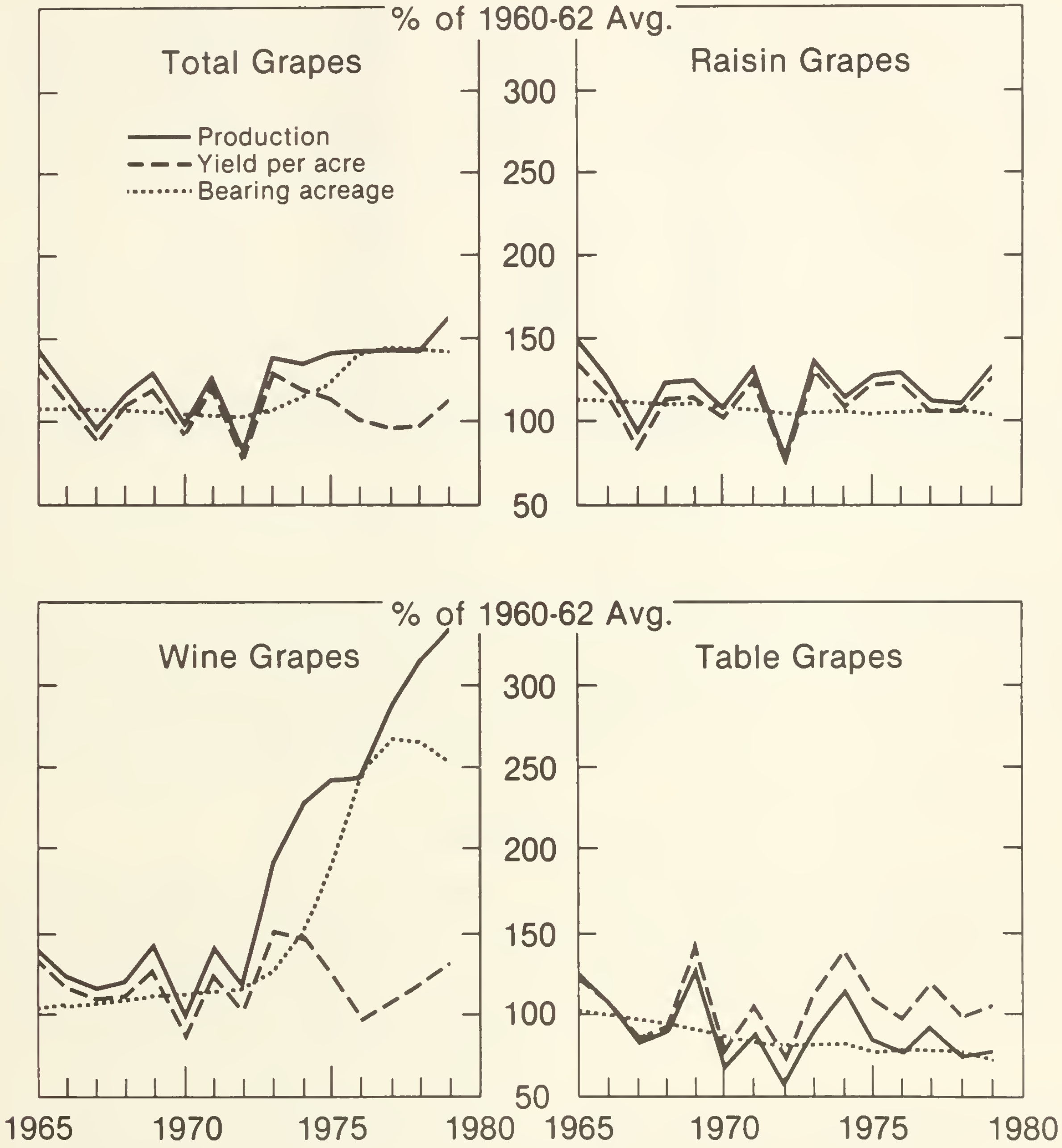
This season's U.S. grape production is forecast at a record high 5.07 million short tons (4.60 million metric tons), 4 percent more than the September 1 forecast and 2 percent larger than the record 1979 crop. California's crop improved from a month ago and now is forecast at 4.61 million short tons, up 1 percent from 1979. The increase from last month was in the raisin type. Larger crops of raisin and table varieties more than offset smaller output of wine variety. Potential output in California is still expected to increase during the next few years, consistent with the increase in acreage planted for all three varieties. In addition, yield per acre for all grapes is rising. Trends for bearing acreage, production, and yield per acre for California grapes, by variety, are shown in the following chart.

Total grape production from States other than California is now estimated at 463,200 short tons, up almost 8 percent from last year, with larger crops expected for all States except Arizona and Michigan. Estimated production in New York, at 175,000 short tons, is 6 percent larger than 1979. Prospects in Washington are for a crop of 127,000 short tons, up 25 percent from last year. All together, production from these States accounts for 9.2 percent of the total crop, compared with 8.7 percent a year ago. Quality is good and sugar content high for most of these grapes. Most are Concord varieties, which are largely used for canned or frozen concentrated grape juice, although some go into wine.

Market Prospects and Prices

Through mid-October, shipments of fresh table grapes totaled 509.1 million pounds, up almost 15

California Grapes: Acreage, Yield and Production



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USDA

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Table 11—Grapes: Total production and season average prices received by growers in principal States, 1978, 1979, and indicated 1980 production

State	Production[1]			Price per ton[2]	
	1978	1979	1980	1978	1979
	Short Tons			*Dollars*	
New York	188,000	165,000	175,000	244.00	234.00
Pennsylvania	57,500	55,500	60,000	232.00	218.00
Ohio	12,000	12,000	13,500	212.00	207.00
Michigan	67,500	58,500	50,000	223.00	237.00
Missouri	3,300	4,500	5,200	231.00	310.00
North Carolina	6,800	5,800	6,000	300.00	258.00
Georgia-South Carolina	5,100	5,200	5,800	228.00	295.00
Arkansas	8,200	8,200	8,300	217.00	216.00
Arizona	14,300	13,500	12,400	943.00	930.00
Washington	187,000	102,800	127,000	191.00	205.00
California:					
Wine	1,706,000	1,821,000	1,750,000	210.00	214.00
Table	393,000	417,000	460,000	342.00	310.00
Raisin[3]	1,918,000	2,320,000	2,400,000	229.00	239.00
Dried[4]	228,500	302,300	—	1,067.00	1,151.00
Not dried	912,000	944,000	—	217.00	219.00
All	4,017,000	4,558,000	4,610,000	232.00	236.00
United States	4,566,700	4,989,000	5,073,200	233.00	237.00

[1] Includes unharvested production and excess cullage (tons) U.S. 1978-248,900 (248,000 tons fresh equivalent raisin type in California laid, but not harvested due to severe weather damage); 1979-300. [2] Price derived from unrounded data for California all varieties and raisin varieties. [3] Fresh equivalent of Dried and not dried. [4] Dried basis 1 ton of raisins is equivalent to 4.40 tons of fresh grapes for 1978 and 4.55 for 1979.

Sources: Crop Production and Noncitrus fruit and Nuts, CRB, ESS.

percent from the corresponding period a year ago. Consequently, shipping point prices for most California grapes have declined seasonally from the high levels early in the season, but are still above year-earlier levels. In mid-October, Ribier was quoted at $8.67 per 23-pound lug in the central San Joaquin Valley, California, compared with $7.00 last year. F.o.b. prices for table grapes are likely to remain higher as supplies decline seasonally.

Demand for fresh grapes so far this season has been good, as total unloads through mid-October were 6 percent above last season. Foreign demand for U.S. fresh grapes is also up somewhat. Exports during the first 3 months of the 1980/81 season (June-August) amounted to 14,977 metric tons, up 1 percent from the same period of 1979/80. Exports have increased as the season has progressed.

Raisins

Despite a larger crop, the field price for raisins in California has been settled between growers and processors at $1,200 per short ton for free tonnage Thompson Seedless, compared with $1,150 a year ago. The established price for Zanta currants was $1,160 per short ton, compared with $1,100 last year.

Because of the lateness of the 1980 season, raisin deliveries to handlers are running considerably behind last year's pace. Seasonal deliveries up to October 11 totaled 97,130 tons, almost one-half of the volume for the same period last season. However, with a larger raisin grape crop and reduced demand from wineries likely, total production of natural Thompson raisins could still be large. A large pack combined with a sizable carryover would boost supplies of raisins during the 1980/81 season.

Large Crushing Expected

Reported use of California grapes for crushing as of October 18 totaled 2.5 million short tons (fresh basis), up from 2.4 million short tons during the same period last season. The increase is attributed entirely to larger crushing of raisin variety grapes. The larger grape crops this year in States other than California, especially the Great Lake States, are expected to result in a larger crush of Concord and other American-type grapes.

Wholesale prices of wines have been well above a year ago. The BLS September wholesale price index for all Wines stood at 216.7 (1967=100), up 14 percent from a year ago. Prices are expected to rise since higher wages were agreed upon between wineries and wine workers in California after the strikes in September.

Pears

Slightly Larger Crop

The final forecast of the 1980 U.S. pear crop is 888,000 short tons (805,000 metric tons), 3 percent larger than the 1979 crop. Output of Bartlett pears is forecast at 612,000 short tons (555,000 metric tons), up 3 percent from the 1979 total. Production of other pears grown on the Pacific Coast, most of which are fall and winter varieties, is forecast at 231,000 short tons (210,000 metric tons), 3 percent more than last year's crop. Pear production in other than Pacific Coast States is forecast at 44,800 short tons, down 1 percent from a year earlier.

Moderately Lower Prices

Despite a larger crop, shipments of fresh pears through mid-October have been running slightly behind last year's pace. The larger crop has resulted in lower prices for Bartletts in California shipping points. During the week ending October 18, the f.o.b. price quotation for Bartletts at the Lake County District was $9.00 per box (U.S. No. 1, sizes 90-135), compared with $11.35 a year ago. In contrast, f.o.b. prices for Oregon Bartlett pears during the same period were quoted higher. Prices in Medford, Oregon averaged $10.50 per box (U.S. No. 1, sizes 90-135), compared with $9.75 last year. However, because of the larger crop, prices for winter pears are not expected to be as strong as last year. In addition, the record apple crop could dampen pear prices.

The larger Bartlett crop has caused more pears to be delivered to processors. However, even with substantially larger carryover of canned pears at the beginning of the season, growers and canners in California agreed to a field price of $175 per short ton for No. 1 grade Bartletts, compared with $172.50 a year ago. Likewise, the Washington-Oregon Canning Pear Association reported the cannery price for No. 1 Bartletts, 2-1/4 inches and larger, at $175 per short ton, compared with $170 last year.

Table 12—Pears: Shipping point prices, selected regions 1979 and 1980

Shipping points	Mid-October F.O.B. prices		Units
	1979	1980	
Lake County Dist., California: Bartlett	11.35	9.00	US No. 1, std. box wrapped pack, 90-113's
Medford Oregon: Bartlett	9.75	10.50	Boxes, wrapped, US No. 1, 90-135's

Source: F.O.B. prices, AMS.

Exports of fresh pears during the first 2 months of the 1980/81 season (July and August) totaled 5,212 metric tons, about the same as a year ago. However, exports to Canada declined moderately. However, export prospects of winter pears to Canada, an important destination, are also less favorable because a substantially larger Canadian winter pear crop is expected. On the other hand, total winter pear production in Europe during 1980 is expected to be almost 1 percent smaller than last year. This decline could enhance our prospects for winter pear exports to the European Community (EC) this season.

Processed Noncitrus

The slightly larger noncitrus crop is expected to result in a 1980/81 pack slightly above last year's. Including the larger carryover at the beginning of the season, total supplies of canned noncitrus products will be ample. Supplies of dried fruit, particularly prunes and raisins, are expected to be adequate this season, and frozen fruit and berries will also be larger because of larger berry and tart cherry deliveries to processors. However, even with larger supplies, prices are expected to remain firm for most processed items because of higher costs of fruits, processing, and distribution.

Larger Supplies of Frozen Fruit and Berries

The 1980 U.S. pack of frozen deciduous fruit and berries is expected to be larger than the 533.8 million pounds packed in 1979. Deliveries of strawberries to freezers totaled 194.3 million pounds through early October, compared with 186.9 million pounds a year ago. In addition, freezers' receipts of blackberries, mainly from Oregon, have been sharply above last year. However, even with a larger crop, freezers' receipts of blueberries have been near last year's levels.

The larger tart cherry crop has resulted in a sharply larger pack of frozen cherries. Packing in Michigan accounted for most of the increase; packs from other States were smaller than last year.

Larger Cold Storage Stocks

Cold storage holdings of frozen fruit and berries on October 1 totaled 624.5 million pounds, an increase

Table 13—Stocks of frozen fruit: End of September, 1977-80

Frozen fruit	1977	1978	1979	1980
	Thousand pounds			
Apples	60,971	47,242	37,578	35,697
Apricots	16,149	15,062	14,053	9,908
Blackberries . . .	14,745	12,515	11,870	30,317
Blueberries. . . .	33,656	41,112	45,276	41,245
Boysenberries . .	3,845	3,112	2,941	5,876
Cherries[1]	93,776	96,633	87,281	113,415
Grapes	6,231	5,905	6,257	5,031
Peaches.	59,439	67,864	53,672	51,631
Raspberries . . .	[2]21,767	[2]19,218	[2]21,599	24,689
Strawberries . . .	206,439	162,524	177,244	212,028
Other frozen fruits	113,713	93,185	96,206	94,650
Total frozen fruits.	630,731	785,014	553,977	624,487

[1] Includes both sweet and tart cherries. [2] Includes, red and black raspberries; black raspberries included in other frozen fruit beginning January 1980.

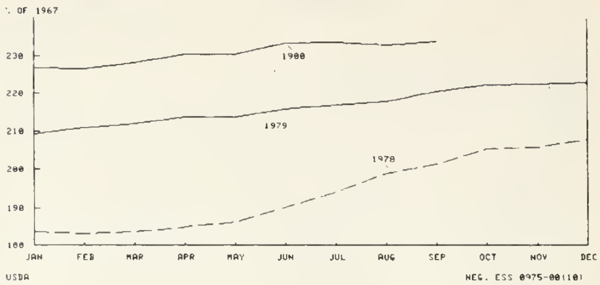
Source: Cold storage, CRB, ESS.

of 13 percent from a year ago. Sharp increases in tart cherries and strawberries are chiefly responsible. Tart cherries, at 99 million pounds, were up 43 percent, and strawberries, at 212 million pounds, were 20 percent larger. Despite larger supplies, the September wholesale price of frozen strawberries, at $6.18 per dozen 10-ounce packages, was up 3 percent from last year. Prices are likely to remain firm throughout the season because of higher costs of processing.

Ample Supplies of Canned Fruit

Although the packing season is not over, the 1980/81 pack of most canned noncitrus fruit is expected to be larger than last season. Including larger carryover stocks, total supplies of canned fruit for the 1980/81 season will be ample. Complete pack data available so far indicate that the pack of canned apricots from California totaled 3.0 million cases (24 No. 2-1/2's), up 4 percent from last year. Including a carryover more than twice as large as the year before, the total supply of canned apricots is sharply larger than last season. The total unaudited pack of canned clingstone peaches amounted to 25.0 million cases (24 No. 2-1/2's), compared with 24.0 million cases in 1979. The total pack of canned Bartlett pears this season is expected to be larger than last year, in view of a larger crop. The unaudited pack of fruit cocktail totaled 15.0 million cases (24 No. 2-1/2's), up 8.4 percent from last year. Thus, with larger carryover at the beginning of the season, supplies of these major canned fruits will be ample for the 1980/81 season.

CANNED FRUIT: BLS WHOLESALE PRICE INDEX



The larger utilization of tart cherries for canning in Michigan and New York has resulted in a total pack larger than 1979—545,472 cases (24 No. 2-1/2's), up 4 percent from a year ago. With the carryover almost five times more than the previous season, total supply of canned tart cherries is up tremendously. Because of a smaller crop, the total pack of canned sweet cherries was 35 percent below 1979. Consequently, even with a carryover more than double the previous year's, the total sweet cherry supply for 1980/81 is still well below a year earlier.

Carryover of canned apple products was also well above a year ago. Thus, the larger apple crop in major processing areas will assure another large supply of canned apple items. In contrast, supplies of canned purple plums, even with a sharply larger crop, are likely to be smaller, because of the considerably smaller carryover.

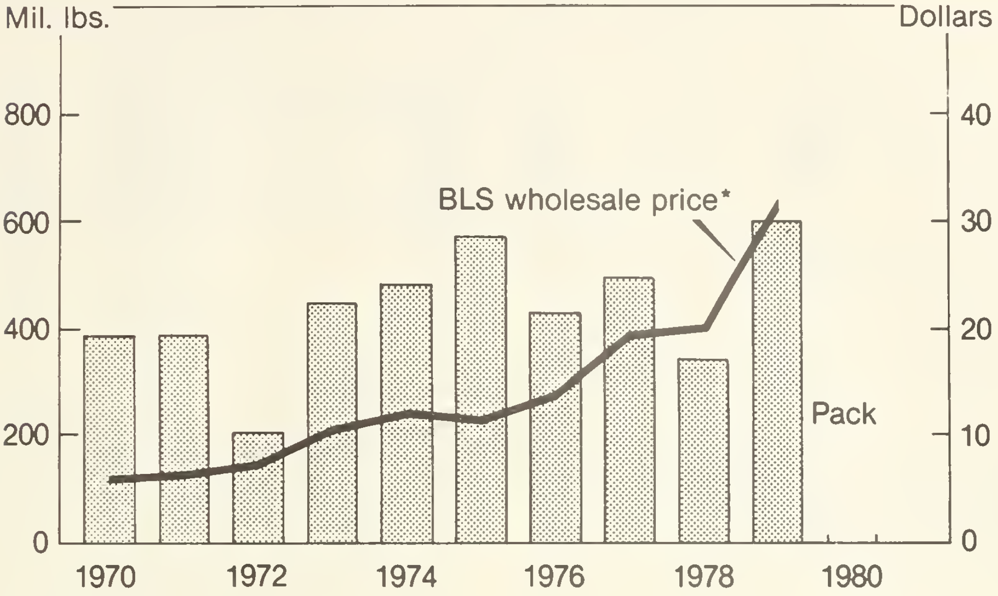
Despite larger supplies, wholesale prices of most canned deciduous fruit have been above year-earlier levels. The BLS September wholesale price index of canned fruit was 233.7 (1967=100), up 6 percent. Since most fruit prices contracted are higher and the cost of processing continues to rise, wholesale prices are expected to remain firm. However, there will be occasional promotional price reduction to stimulate sales. Retail prices will also stay higher than a year ago, reflecting higher wholesale prices and distribution costs.

Adequate Supplies of Dried Fruits

With a larger crop of raisin variety grapes, early season trade estimates indicate that California may produce 308,000 short tons of raisins, slightly above last year. Because of the winery workers' strike, some additional Thompson seedless grapes originally intended for winery use were diverted to raisins. Production of dried prunes, the other major dried fruit item, is estimated at 165,000 short tons, 22 percent above last season. Including condsiderably larger carryover, supplies of dried fruit are expected to be well above last season.

Demand for raisins is expected to be good both here and abroad. Reports indicate that foreign

U.S. Raisin Pack and Wholesale Prices



*15 oz. packages

USDA Neg. ESS 164-80(10)

raisin-production this season will again be below normal. The political, economic, and other problems in some principal foreign raisin producing countries could reduce the supplies of raisins available for export market and enhance foreign demand for our raisins. However, wholesale prices of raisins are likely to remain relatively steady in view of the larger supply in prospect. The BLS September wholesale price of raisins was $24.50 per case (24 packages, 15 ounces each).

The Raisin Administrative Committee has recommended that USDA establish free and reserve percentage of 56 and 44 percent respectively for natural seedless raisins and 39 and 61 percent respectively for dipped seedless raisins. The marketing order require final percentages to be recommended by February 15, 1981.

According to the Prune Administrative Committee, the total supply of dried prunes for 1980/81 is expected to be 207,950 short tons (processed condition), up 26 percent from last season. Early shipments were strong for both domestic and foreign markets. To stimulate sales, there have been occasional promotional price reductions. However, the wholesale price advanced to $17.59 per case (24 packages, 16 ounces each) in September from $17.07 in August. The present price is slightly above year-earlier levels. In view of the supply, though, during the remainder of the marketing season wholesale prices of dried prunes will remain steady.

TREE NUTS

The 1980 crop of the four major edible tree nuts—almonds, filberts, pecans, and walnuts—is estimated at 606,900 short tons (in-shell basis), 4 percent smaller than 1979. Filbert and walnut crops are forecast to be larger than last year, while the pecan crop will be 7 percent smaller. The almond crop is expected to be 10 percent below last year's record production. With favorable demand in prospect, prices for the 1980 edible tree nuts are expected to be firm.

Almonds

Smaller Almond Crop

The 1980 almond crop in California is forecast at 340 million pounds (154,000 metric tons), down 10 percent from last year's record crop. The decline is attributed to rain during bloom. Since there has been an increase in bearing acreage and in trees per acre,

Table 14—Tree nuts: Production in principal States, 1978, 1979, and indicated 1980

Crop and States	1978	1979	Indicated 1980	Crop and State	1978	1979	Indicated 1980
	Short tons				*Short tons*		
Almonds:				Pecans:			
California	142,700	303,716	274,600	North Carolina	2,000	650	1,300
				South Carolina	3,000	1,000	1,100
Filberts:				Georgia	67,500	32,500	50,000
Oregon	13,700	12,700	13,600	Florida	2,100	1,300	2,200
Washington	350	300	400	Alabama	11,000	2,000	10,000
2 States	14,050	13,000	14,000	Mississippi	5,000	1,250	3,250
				Arkansas	2,000	750	450
Walnuts, English:				Louisiana	4,500	8,000	7,000
California	160,000	208,000	220,000	Oklahoma	7,750	5,000	2,500
				Texas	13,000	45,500	12,500
				New Mexico	7,500	7,350	8,000
				Total	125,350	105,300	98,300
Macadamia nuts:							
Hawaii	10,490	13,330	n.a.	Improved varieties[1]	82,250	49,550	64,670
				Native and seedling	43,100	55,750	33,630
				Total 4 tree nuts[2]	442,100	630,016	606,900

[1] Budded, grafted, or topworked varieties. [2] Excludes Macadamia nuts.

n.a.—Data not available temporarily.

Source: Crop Production, CRB, ESS.

a return to a large crop and a continued strong industry growth pattern is likely in 1981.

Foreign production of almonds in 1980 is expected to be substantially larger than last year's small production. Spain, the leading foreign producer, indicates a crop nearly 40 percent above the 1979 one. Italy, the second largest producer, expects a harvest almost three times as large as last year's. If current prospects are realized, the 1980 world almond production will be record large despite a 10 percent drop in the U.S. crop.

During 1979/80, world almond prices were sharply hiqher than the preceding season, reflecting good demand. With the start of harvest, prices for foreign almonds have weakened somewhat. Prices paid for Italian shelled Bari unselected almonds were quoted at $2.37 per pound (f.o.b. Italian ports) on September 28, compared with $2.72 a year ago. The decline can be attributed the sharply larger crop in prospect.

Reflecting the larger stocks, U.S. shipments of almonds got off to a fast start in the 1980/81 season. According to the Almond Board of California, during the first 3 months of the marketing year (July-September), exports of shelled almonds totaled 67.8 million pounds, up nearly 33 percent from a year earlier. West Germany, our top customer, bought 21.2 million pounds, and accounts for 45 percent of our total almond exports. Exports to France and the United Kingdom also showed strength, up 96 and 30 percent, respectively, from a year ago. Shipments to domestic markets also increased substantially despite higher prices. With the smaller crop and good demand, grower prices are likely to remain firm. However, larger crops in Spain and the other Mediterranean countries probably will have a moderating influence on world prices.

Filberts

Moderately Larger Filbert Crop

The 1980 filbert crop is forecast at 14,000 short tons (12,700 metric tons), 8 percent more than last year's production, but 1 percent below the 1978 crop. Nut sizes are expected to be large. The Oregon crop, at 13,600 short tons, is up 7 percent from last year and accounts for 97 percent of the U.S. filbert crop.

Even with a large crop in the United States, world production of filberts is expected to be below 1979. Turkey, the leading producer, expects a crop of 270,000 metric tons (in-shell basis), 7 percent smaller than last year's output. Because of the increased cost of production, Turkey's support price for the 1980 filbert crop is expected to rise 50 percent from last year. The commercial filbert production in Spain is estimated at 23,000 metric tons (in-shell basis), down almost 20 percent from 1979. However, Italy expects a crop of 100,000 metric tons, 25 percent more than 1979. Thus, with higher support prices for the Turkish crop and smaller world production, world prices for filberts are expected to remain firm.

U.S. growers will benefit from the higher world prices. Last year's small crop resulted in filbert grower prices that were considerably above 1978. This year, higher world prices for filberts and smaller tree nut production will push grower prices above the 1979 average of $951 per short ton.

U.S. imports of shelled filberts, mostly from Turkey, totaled 1,704 metric tons during the first 8 months of 1980, down 40 percent from the corresponding period a year earlier. With the larger 1980 crop in the United States and higher world prices in prospect, imports of filberts are expected to continue to slacken.

Walnuts

Record Crop

The September 1 prospect for the 1980 walnut crop improved from the August forecast, with the production estimated at 220,000 short tons (200,000 metric tons), up 6 percent from 1979 and 38 percent from 1978. Average nut size is larger than last year. Walnut bearing acreage continued to increase and is estimated at 181,550 acres for 1980, up from 180,134 acres in 1979. Thus, walnut production is expected to continue to increase in the years ahead.

The 1980/81 marketing year got off to a fast start. According to the Walnut Marketing Board, shipments of both shelled and in-shell walnuts during the first 2 months (August and September) were substantially larger than a year earlier. Shipments to Europe continue strong. Our major customers are West Germany, Italy, the Netherlands, and Spain. However, with a 27-percent larger walnut crop from France this year, our exports to Europe could be affected. Nevertheless, the walnut industry is faced with a very favorable export market in the years ahead, with U.S. production expected to expand, and output from the other major producing countries expected to drop slightly. The minimum export sale prices for in-shell walnuts for the 1980/81 marketing season have been set at moderately to substantially higher levels than last season. For example, prices of the jumbo size in-shell walnut in 50-pound containers or larger, (f.a.s. ports in area of production) is set at $0.68 a pound, compared with $0.62 a year ago.

Grower prices for California walnuts averaged $819 per short ton in 1979, down from $1,302 in 1978. With good world prices in prospect and smaller crops of almonds and pecans, grower prices for walnuts this year may average higher than last year despite the larger crop.

Pecans

Moderately Smaller Crop

The U.S. pecan crop of 197 million pounds (89.2 metric tons) is up 2 percent from the September 1 forecast, but is still 7 percent below last year's production. Increases in the September production forecast for Georgia, Louisiana, and Mississippi more than offset declines for Florida, Oklahoma, and South Carolina.

The smaller crop is primarily the result of a sharp decrease in Texas pecan production. The Texas pecan crop, estimated at 25 million pounds, is down 73 percent from last year's unusually large crop and down almost 4 percent from 1978. The drought contributed to light sets and undersized kernels. Earlier dry conditions resulted in a heavy drop, but recent rains while nuts were in the soft dough stage helped fill nuts. Georgia regained its position as the leading State, with production up 54 percent from last year because of better nut sizes. But the Georgia crop is still 26 percent below 1978. Prospects in Alabama improved considerably, with a crop of 20 million pounds, 5 times as much as a year ago. Overall, production of the native and seedling pecan crop is expected to be down 40 percent, which more than offset the 31 percent increase from improved varieties. Production from improved varieties is expected to account for 66 percent of this year's crop, compared with 47 percent last year and 66 percent in 1978.

Carryover stocks of pecans at the beginning of the season were sharply below a year ago. Thus, with a smaller crop, total supply of pecans will be smaller this season, keeping grower prices higher than last year. Pecan prices received by growers in 1979 averaged 55.2 cents per pound for all varieties, down from 60.5 cents in 1978.

U.S. PECAN PRODUCTION AND PRICES RECEIVED BY GROWER

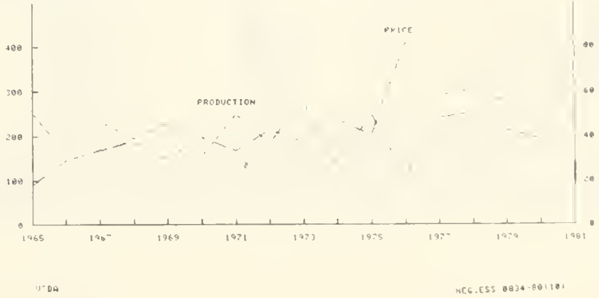


Table 15—Seven citrus fruits: Production, use and value, United States, 1975/76 through 1979/80[1]

Fruit and season	Production[2]	Utilization of production				Value of production
		Fresh		Processed		
		Quantity	Percentage	Quantity	Percentage	
	1,000 short tons		*Percent*	*1,000 short tons*	*Percent*	*1,000 dollars*
Oranges:						
1975/76	10,493	1,986	18.9	8,507	81.1	678,717
1976/77	10,546	1,854	17.6	8,692	82.4	811,196
1977/78	9,546	1,764	18.5	7,782	81.5	1,198,657
1978/79	9,160	1,607	17.5	7,553	82.5	1,296,044
1979/80	11,839	2,135	18.0	9,704	82.0	1,304,177
Grapefruit:						
1975/76	2,850	1,317	46.2	1,533	53.8	154,802
1976/77	3,032	1,141	37.6	1,891	62.4	175,467
1977/78	3,030	1,215	40.1	1,815	59.9	189,692
1978/79	2,757	1,155	41.9	1,602	58.1	231,616
1979/80	2,986	1,152	38.6	1,834	61.4	300,175
Lemons:						
1975/76	670	416	62.1	254	37.9	101,949
1976/77	988	497	50.3	491	49.7	92,500
1977/78	991	463	46.7	528	53.3	110,635
1978/79	745	455	61.1	290	38.9	134,573
1979/80	789	407	51.6	382	48.4	161,319
Limes:						
1975/76	43	23	53.5	20	46.5	10,012
1976/77	40	21	52.5	19	47.5	11,610
1977/78	18	13	72.2	5	27.8	8,791
1978/79.	29	19	65.5	10	34.5	11,635
1979/80	44	25	56.8	19	43.2	13,805
Tangelos:						
1975/76	248	101	40.7	147	59.3	13,860
1976/77	216	103	47.7	113	52.3	13,296
1977/78	221	90	40.7	131	59.3	23,128
1978/79	189	77	40.7	112	59.3	23,310
1979/80	288	81	28.1	207	71.9	26,816
Tangerines:						
1975/76	236	160	67.8	76	32.2	25,976
1976/77	249	173	69.5	76	30.5	32,104
1977/78	228	137	60.1	91	39.9	35,560
1978/79	237	134	56.5	103	43.5	43,560
1979/80	275	157	57.1	118	42.9	37,559
Temples:						
1975/76	248	105	42.3	143	57.7	15,895
1976/77	171	53	31.0	118	69.0	12,882
1977/78	221	93	42.1	128	57.9	26,215
1978/79	212	97	45.8	115	54.2	30,503
1979/80	270	125	46.3	145	53.7	25,020
Total:						
1975/76	14,788	4,108	27.8	10,680	72.2	1,001,211
1976/77	15,242	3,842	24.7	11,400	75.3	1,149,055
1977/78	14,255	3,775	26.5	10,480	73.5	1,592,678
1978/79	13,329	3,544	26.6	9,785	73.4	1,771,241
1979/80	16,491	4,082	24.8	12,409	75.2	1,868,871

[1] Preliminary. [2] Production having value.

Data prepared from citrus production and utilization reports, CRB, ESS.

Table 16—Selected citrus fruit: Use for processing by percentages of total production, 1972/73 through 1979/80

State, variety, and season	1972/73	1973/74	1974/75	1975/76	1976/77	1977/78	1978/79	1979/80[1]
	Percent							
ORANGES:								
Florida:								
Temple.	52.1	63.7	64.0	57.7	68.8	58.2	54.6	53.6
Early and midseason . . .	92.6	93.4	92.3	93.4	94.7	93.5	93.1	94.5
Valencia	93.0	93.2	92.2	93.6	96.2	94.7	92.6	94.9
Total.	92.8	93.3	92.3	93.5	95.2	94.1	92.9	94.7
California:								
Navel and miscellaneous.	33.2	20.5	27.2	27.2	24.7	24.0	31.2	33.4
Valencia	50.4	35.7	43.5	44.5	32.5	39.8	36.4	35.2
Total.	42.8	27.5	35.3	35.2	28.1	32.4	33.5	34.2
GRAPEFRUIT:								
Florida:								
Seedless	52.4	51.2	50.1	50.9	61.5	58.2	53.8	58.6
Pink	38.0	35.7	33.5	31.2	47.8	37.6	28.3	33.6
White	59.5	58.5	57.5	60.0	67.2	68.6	65.4	71.4
Other seeded	97.2	98.6	98.0	98.6	99.3	99.0	99.0	98.7
Total.	62.4	61.1	57.9	58.5	68.2	64.9	60.4	64.4
Texas.	46.3	49.5	36.3	32.1	47.7	44.5	55.6	46.8
TANGERINES:								
Florida.	32.7	26.6	28.7	30.5	29.8	40.6	46.0	40.0
California	45.0	26.5	37.0	38.5	33.0	41.4	34.5	52.4
LEMONS:								
California	48.3	36.9	56.8	37.1	47.6	51.2	35.0	48.5
Arizona	59.4	40.2	73.3	43.2	58.2	60.3	49.1	48.0

[1] Preliminary.

Data prepared from citrus production and utilization reports, CRB, ESS.

Table 17—Florida oranges used for frozen concentrate

Crop year	Florida orange and Temple production	Used for frozen concentrates		Yield per box
	Million boxes	*Million boxes*[1]	*Percent*	*Gallons*
1975/76	186.7	144.5	77.4	1.29
1976/77	190.6	148.7	78.0	1.07
1977/78	172.7	132.2	76.5	1.23
1978/79	168.7	130.2	77.2	1.34
1979/80	212.7	174.9	82.2	1.34
1980/81	208.7	n.a.	n.a.	[2] 1.37

[1] Includes tangelos, Temple, tangerines, and K-early citrus. [2] The reported 43.4 degree level will become effective at the start of the new marketing season on December 1, 1980 for all Florida FCOJ sold in the U.S. in retail and institutional size containers. The yield level previously reported has been for 45.0 degree brix equivalent. The conversion ratio for 45.0 degrees to 43.4 degrees is 1.0442029.

Source: Crop Production, CRB, ESS.

Table 18—Citrus fruit: Season average equivalent returns per box received by growers, by variety and utilization, by State and total United States, 1977/78 - 1979/80 seasons

Variety, States and U.S.	1977/78						1978/79						1979/80					
	Equivalent P.H.D.[1]			Equivalent on-tree			Equivalent P.H.D.[1]			Equivalent on-tree			Equivalent P.H.D.[1]			Equivalent on-tree		
	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.
	Dollars																	
ORANGES:																		
Florida:																		
Early and midseason	5.15	5.85	5.10	3.90	4.60	3.85	5.84	6.60	5.78	4.44	5.20	4.38	4.89	5.86	4.83	3.44	4.41	3.38
Valencia	5.65	6.45	5.60	4.40	5.20	4.35	6.35	6.95	6.30	4.95	5.55	4.90	5.32	5.13	5.33	3.87	3.68	3.88
All	5.39	6.10	5.34	4.14	4.85	4.09	6.07	6.76	6.01	4.66	5.36	4.61	5.07	5.56	5.05	3.63	4.11	3.60
Temple	5.35	6.40	4.60	3.92	5.00	3.15	6.49	7.25	5.86	4.89	5.70	4.21	4.17	4.75	3.67	2.54	3.15	2.02
California:																		
Navel and misc.	5.99	7.74	.44	4.75	6.50	-.80	7.05	9.76	1.10	5.42	8.02	-.29	4.13	5.70	1.01	2.73	4.30	-.39
Valencia	5.76	8.21	2.05	4.52	6.97	.81	6.67	9.02	2.56	4.79	6.92	1.06	3.33	4.22	1.70	1.93	2.82	.30
All	5.87	7.96	1.49	4.63	6.72	.25	6.88	9.45	1.80	5.14	7.55	.36	3.77	5.04	1.33	2.37	3.64	-.07
U.S.[2]	5.45	7.20	5.00	4.21	5.98	3.76	6.15	8.39	5.62	4.70	6.69	4.23	4.76	5.13	4.68	3.34	3.73	3.24
GRAPEFRUIT:																		
Florida:																		
Seedless	2.73	3.35	2.28	1.68	2.35	1.20	3.65	4.33	3.05	2.50	3.23	1.88	4.53	5.30	3.99	3.33	4.15	2.75
Seeded	2.45	([3])	2.45	1.45	([3])	1.45	2.94	([3])	2.94	1.84	([3])	1.84	3.99	([3])	3.99	2.84	([3])	2.84
All	2.68	3.35	2.32	1.64	2.35	1.25	3.54	4.33	3.02	2.41	3.23	1.87	4.45	5.30	3.99	3.26	4.15	2.77
Texas	1.58	1.85	1.24	.95	1.22	.62	1.96	2.72	1.36	1.26	2.00	.66	3.32	3.93	2.63	2.59	3.18	1.91
California	3.48	6.35	.22	2.24	4.80	-.66	4.97	7.87	.58	3.70	6.59	-.67	2.96	5.65	.66	1.82	4.50	-.48
Arizona	1.34	3.10	.16	.44	2.20	-.74	2.89	5.54	.58	1.69	4.34	-.62	2.59	5.02	.68	1.49	3.92	-.42
U.S.	2.54	3.45	1.92	1.55	2.46	.93	3.44	4.61	2.58	2.35	3.53	1.48	4.10	5.13	3.45	2.97	4.04	2.29
LEMONS:																		
California	4.57	8.47	.86	2.67	6.57	-.104	7.98	11.74	.98	5.78	9.43	-1.00	7.72	11.30	3.92	4.75	8.30	.97
Arizona	3.08	6.50	.84	.88	4.30	-1.36	4.01	6.90	1.02	1.73	4.34	-.98	8.09	12.90	2.89	5.13	9.90	-.04
U.S.	4.24	8.10	.86	2.27	6.14	-1.12	6.87	10.61	.99	4.64	8.24	-.99	7.77	11.54	3.77	4.81	8.54	.82
TANGERINES:																		
Florida	6.90	8.65	4.35	4.79	6.60	2.15	7.20	8.80	5.33	4.99	6.70	2.98	6.64	8.65	3.62	4.28	6.35	1.17
California	6.32	10.20	.84	4.97	8.85	-.51	10.26	15.10	1.05	8.51	13.20	-.40	5.10	9.20	1.38	2.10	6.20	-1.62
Arizona	7.72	10.90	.85	6.37	9.55	-.50	7.74	13.10	1.05	5.91	11.00	-.45	4.33	6.40	1.38	1.33	3.40	-1.62
U.S.	6.84	9.35	2.98	5.02	7.58	1.16	8.07	11.08	4.03	6.01	9.05	1.95	5.96	8.49	2.66	3.36	5.95	-.03
TANGELOS:																		
Florida	4.72	5.20	4.40	3.29	3.80	2.95	5.55	6.41	4.96	3.90	4.81	3.26	4.19	6.23	3.39	2.56	4.63	1.74
LIMES:																		
Florida	19.11	24.95	2.55	15.72	21.35	-.25	16.16	23.00	2.40	12.43	19.00	-.80	12.55	20.25	2.52	8.18	15.60	-1.48

[1] P.H.D.—Packing-house door. [2] Excludes Temples. [3] Fresh sales insignificant.

Source: Agricultural Prices, CRB, ESS.

Table 19—Frozen concentrated citrus juices: Florida canners' stocks, packs, imports, supplies and movement, current season with comparisons

Item and season	Carryin	Pack		Imports and other supply		Supply		Movement		Stocks[1]
		To date[1]	Total season	To date[1]	Total season	To date[1]	Total season	To date[1]	Total season	
	1,000 gallons									
Orange:										
1978/79	30,909	173,053	173,053	36,420	43,367	240,382	247,329	180,029	209,943	60,353
1979/80	37,386	231,257		19,394		288,037		208,642		79,395
Grapefruit:										
1975/76	4,235	9,316	9,316	144	211	13,695	13,762	9,295	10,456	4,400
1976/77	3,306	11,258	11,258	1,146	1,158	15,710	15,722	10,456	11,643	5,254
1977/78	3,854	13,693	13,693	355	355	17,902	17,902	11,589	13,665	6,313
1978/79	4,237	14,243	14,243	181	181	18,661	18,661	14,553	16,383	4,107
1979/80	2,278	19,443		76		21,797		15,313		6,485
Tangerine:										
1975/76	393	1,111	1,111	15	15	1,519	1,519	1,086	1,137	433
1976/77	382	926	926	21	21	1,329	1,329	762	1,041	567
1977/78	288	1,672	1,672	—	—	1,960	1,960	1,372	1,498	587
1978/79	462	1,367	1,367	17	17	1,846	1,846	1,194	1,253	652
1979/80	593	2,142		—		2,735		1,594		1,141

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[1] For the 1979/80 season, week ending October 11; 1978/79 October 13; 1977/78 October 14; 1976/77 October 15; 1975/76 October 16. These respective date include data through the 45th week of each season.

Source: Florida Citrus Processors Association.

Table 20—Chilled citrus products: Packs, stocks, supply, and movement, Florida, 1975/76 through 1979/80

Item and season[1]	Beginning stocks	Pack[2]	Total supply	Season movement	Ending stocks
			1,000 gallons		
Orange juice, s.s.:					
1975/76[3]	16,779	174,804	191,583	173,558	18,025
1976/77	18,025	178,685	196,710	180,903	15,807
1977/78	15,807	184,966	200,773	185,088	15,685
1978/79	15,685	206,184	221,869	206,149	15,721
1979/80	15,721	234,768	250,489	233,775	16,714
Grapefruit juice, s.s.:					
1975/76[3]	1,448	24,538	25,986	24,583	1,403
1976/77	1,403	25,074	26,477	25,111	1,366
1977/78	1,366	25,460	26,826	24,921	1,906
1978/79	1,906	27,132	29,037	27,597	1,440
1979/80	1,440	28,674	30,114	27,364	2,750
Grapefruit sections:					
1975/76[3]	338	1,787	2,125	1,891	234
1976/77	234	2,095	2,329	1,982	347
1977/78	347	1,636	1,983	1,676	307
1978/79	307	1,642	1,949	1,727	222
1979/80	222	1,982	2,204	1,725	479
Orange sections:					
1975/76[3]	118	1,126	1,244	1,027	217
1976/77	217	797	1,014	827	187
1977/78	187	860	1,047	716	331
1978/79	331	657	988	633	355
1979/80	355	743	1,098	708	390
Citrus salad:					
1975/76[3]	627	4,027	4,654	3,599	1,055
1976/77	1,055	2,532	3,587	2,098	489
1977/78	489	2,945	3,434	2,611	823
1978/79	823	2,392	3,215	2,436	779
1979/80	779	2,201	2,980	2,478	502

[1] Season beginning approximately October 1. [2] Packs of chilled juices include products of fresh fruit and frozen concentrate and excludes reprocessed single strength bulk. [3] 1975/76 season incorporates 53 weeks.

Source: Florida Citrus Processors Association.

Table 21—Canned citrus juices and fruit: Florida canners' stocks, packs, supplies, and movement, current season with comparisons

Item and season[1]	Beginning stocks	Pack	Supply	Movement	Ending stocks
	1,000 cases, 24 No. 2's				
Juices[2]					
Orange:[3]					
1975/76[5]	2,027	10,635	12,662	10,746	1,916
1976/77	1,916	10,767	12,683	10,592	2,091
1977/78	2,091	11,654	13,745	11,865	2,074
1978/79	2,074	13,222	15,296	12,678	2,618
1979/80	2,618	13,869	16,487	13,974	2,513
Grapefruit:[4]					
1975/76[5]	3,907	18,926	22,833	19,151	3,682
1976/77	3,682	18,809	22,491	17,769	4,722
1977/78	4,722	17,246	21,968	18,407	3,561
1978/79	3,561	16,764	20,325	17,295	3,030
1979/80	3,030	16,604	19,634	16,221	3,413
Blend:					
1975/76[5]	276	1,687	1,963	1,566	397
1976/77	397	1,308	1,705	1,517	188
1977/78	188	1,664	1,852	1,487	364
1978/79	364	1,255	1,619	1,365	254
1979/80	254	1,314	1,568	1,161	407
Tangerine:					
1975/76[5]	1	19	20	20	(6)
1976/77	(6)	35	35	20	15
1977/78	15	8	23	21	2
1978/79	2	19	21	18	4
1979/80	4	17	21	16	5
Canned fruits:					
Grapefruit sections:					
1975/76[5]	914	1,602	2,516	1,906	610
1976/77	610	1,722	2,332	1,950	382
1977/78	382	1,753	2,135	1,842	293
1978/79	293	1,823	2,116	2,002	114
1979/80	114	1,966	2,080	1,792	288
Orange sections:					
1975/76[5]	8	26	34	17	17
1976/77	17	10	27	21	6
1977/78	6	16	22	17	4
1978/79	4	15	19	15	4
1979/80	4	18	22	17	5
Citrus salad:					
1975/76[5]	85	112	197	126	71
1976/77	71	84	155	124	31
1977/78	31	111	142	114	29
1978/79	29	76	105	80	25
1979/80	25	74	99	81	18

[1] Season beginning approximately October 1. [2] Single strength. [3] "Reconstituted canned orange juice", which has never been included in the Association's statistics, is now included with "orange juice". [4] "Reconstituted canned grapefruit juice", which previously has been reported separately, is now included with "grapefruit juice". [5] 1975/76 season incorporates 53 weeks. [6] Less than 500 cases.

Source: Florida Citrus Processors Association.

Table 22—Canned noncitrus fruit and juice: Canners' carryin, pack, supplies, and shipments, current season with comparisons

Item and season	Carryin	Pack	Total supply	Total season shipments
	1,000 equivalent cases, 24 No. 2½'s			
Apricots:[1] [2]				
1976/77	1,534	2,387	3,921	3,051
1977/78	870	2,269	3,139	2,687
1978/79	452	2,127	2,579	2,312
1979/80	267	2,887	3,154	2,438
1980/81	716	2,994	3,710	
Pineapple:				
1976/77	5,437	17,270	22,707	15,709
1977/78	6,998	18,424	25,421	16,902
1978/79	8,520	18,349	26,869	17,902
1979[3]	12,553	26,877	39,430	27,545
1980	11,885			
	1,000 equivalent cases, 24 No. 2's			
Canned juice:				
Single strength pineapple:				
1976/77	2,235	10,205	12,440	9,614
1977/78	2,826	11,977	14,803	11,356
1978/79	3,447	11,336	14,783	11,659
1979	4,280	12,185	16,465	12,247
1980	4,218			
	1,000 equivalent cases, 6 No. 10's			
Concentrated pineapple:				
1976/77	257	1,157	1,414	980
1977/78	437	1,319	1,756	1,268
1978/79	488	1,353	1,841	1,273
1979	500	1,543	2,043	1,604
1980	439			

[1] Season beginning June 1. [2] California only. [3] Pineapple canned cases No. 2 cans instead of 2-½ cans beginning 1979.

Note: Beginning 1979 pineapple canned and juice now reported on calendar year basis, previous seasons June 1-May 31.

Sources: Canners League of California and Pineapple Growers Association of Hawaii.

Table 23—U.S. wholesale prices of selected dried and frozen fruit items, by months, 1976-80

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
	Dollars per cases											
DRIED FRUIT:												
Prunes (24-1 lb. pkg.):												
1976	8.526	8.428	8.526	8.918	8.918	9.065	9.065	9.424	9.424	9.914	9.914	9.914
1977	10.274	10.274	10.274	10.355	10.355	10.355	10.355	10.486	10.486	11.286	11.629	11.629
1978	11.793	11.858	11.858	11.858	11.923	11.923	11.989	11.989	12.609	13.132	15.321	15.321
1979	15.321	17.281	17.281	17.281	17.281	17.281	17.281	17.281	17.281	17.836	17.836	17.771
1980	17.395	17.232	17.232	17.068	17.068	17.068	17.068	17.068	17.591			
Raisins (24-15 oz. pkg.):												
1976	11.748	11.748	11.870	11.870	11.870	11.993	11.993	11.993	11.993	15.741	20.580	20.825
1977	20.825	20.825	20.825	20.835	20.825	20.335	19.845	20.090	20.090	16.048	16.109	16.109
1978	15.925	15.680	15.680	15.864	16.109	16.268	16.268	17.640	17.824	28.690	35.525	35.525
1979	35.525	34.931	34.913	34.913	34.913	34.913	34.913	34.300	30.160	25.015	24.378	24.378
1980	24.378	24.378	24.378	24.378	24.378	24.378	24.500	24.500	24.500			
FROZEN FRUIT:												
strawberries (12-10 oz. pkg.):												
1976	4.285	4.285	4.285	4.407	4.407	4.407	4.648	4.648	4.648	4.679	4.679	4.679
1977	4.679	4.730	4.730	4.730	4.730	4.730	4.813	4.936	4.936	4.936	4.936	4.936
1978	4.936	4.941	5.076	5.076	5.076	5.076	5.076	5.113	5.187	5.271	5.271	5.234
1979	5.234	5.267	5.267	5.271	5.271	5.271	5.698	5.808	6.016	6.016	6.036	6.046
1980	6.049	6.049	6.049	6.154	6.210	6.210	6.332	6.332	6.180			
FROZEN JUICE:												
Orange, conc. (12-6 oz. cans):												
1976	2.383	2.352	2.352	2.383	2.383	2.383	2.187	2.187	2.187	2.187	2.187	2.089
1977	2.040	2.776	2.752	2.752	2.752	2.910	2.910	3.101	3.223	3.223	3.459	3.508
1978	3.508	3.508	3.514	3.514	3.514	3.514	3.514	3.514	3.514	3.514	3.649	3.787
1979	3.787	3.787	3.787	3.787	3.787	3.787	3.787	3.787	3.787	3.787	3.787	3.787
1980	3.787	3.787	3.787	3.700	3.700	3.626	3.626	3.626	3.626			

Source: Bureau of Labor Statistics, U.S. Department of Labor.

Table 24—U.S. monthly average price indexes for fruit

Item	1979					1980								
	Annual	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.
	(1967=100)													
Wholesale price index:														
Fresh fruit	230.4	237.7	236.4	207.7	230.2	221.8	242.2	237.5	229.6	244.3	224.0	250.1	268.0	267.3
Citrus fruit	238.7	336.3	302.2	184.6	227.7	156.6	165.4	185.3	188.9	186.8	143.7	144.7	273.4	269.6
Other fruit	224.9	189.9	204.3	216.8	229.6	250.3	275.7	259.8	246.6	268.9	259.3	250.7	263.5	264.2
Dried fruit	530.7	557.9	412.0	386.9	381.4	377.0	373.7	373.7	374.8	374.8	375.8	376.9	376.9	381.7
Canned fruit and juice	240.2	245.7	248.1	249.2	248.8	252.4	252.0	253.1	254.7	255.3	257.3	257.6	256.4	257.5
Canned fruit	216.6	220.6	222.4	222.7	223.1	226.8	226.5	228.2	230.4	230.4	233.3	233.5	232.8	233.7
Canned fruit juice	278.1	286.0	289.2	291.4	290.0	293.3	292.9	292.2	254.7	295.3	296.0	296.4	294.6	302.3
Frozen fruit and juice	248.5	251.1	251.1	251.2	251.3	251.3	251.3	251.3	247.0	247.4	243.2	244.0	244.0	243.1
Consumer price index:														
Fresh fruit	248.4	271.6	260.4	242.7	234.9	233.6	235.8	245.4	257.0	264.7	273.9	282.7	302.3	286.3
Index of fruit prices received by growers[1]	204	223	231	248	220	192	201	207	200	215	233	209	196	213

[1] Index for fresh and processed.

Table 25—U.S. monthly average fruit prices received by growers

Commodity and unit	1979				1980								
	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.
Apples for fresh use (cents/lb.)	15.8	13.4	14.0	14.8	14.3	14.7	16.1	16.9	16.9	21.0	23.7	22.6	17.9
Pears for fresh use ($/ton)	234.0	240.0	234.0	237.0	265.0	354.0	435.0	443.0	449.0	450.0	278.0	254.0	244.0
Peaches for fresh use (cents/lb.)	16.0	---	---	---	---	---	---	---	---	24.9	12.3	13.7	21.3
Strawberries for fresh use (cts./lb.). . . .	47.0	48.1	---	---	56.4	65.9	58.9	42.6	45.2	45.9	41.8	46.6	49.0
Oranges for: ($/box)[1]													
fresh use	5.90	6.25	7.17	4.98	3.29	3.51	3.62	3.08	2.98	3.08	3.40	2.89	4.50
Processing	1.06	1.09	2.43	2.99	3.25	3.37	3.28	3.25	3.48	3.65	1.96	.30	.26
All	3.95	4.22	4.96	3.36	3.26	3.39	3.35	3.22	3.41	3.54	2.70	1.93	3.04
Grapefruit for: ($/box)[1]													
fresh use	8.36	4.63	4.17	4.11	3.47	3.56	3.75	4.04	4.56	4.94	3.75	4.77	5.62
Processing	-.80	1.72	2.37	2.38	2.50	2.49	2.62	2.63	1.71	-.46	-.49	-.51	-.58
All	5.07	3.76	3.15	3.06	2.86	2.90	2.93	3.08	3.19	1.93	1.36	1.61	2.84
Lemons for: ($/box)[1]													
Fresh use	16.21	14.71	9.74	7.16	3.41	3.84	4.43	5.10	5.10	6.10	7.50	13.70	12.68
Processing	-.70	-.70	.05	.05	.14	.20	1.14	1.34	1.34	1.34	1.34	1.50	1.54
All	12.42	10.45	6.53	3.93	1.85	1.66	2.32	2.65	3.12	4.03	5.28	8.91	5.96
Tangerines for: ($/box)[1]													
Fresh use	---	9.65	7.01	6.41	5.61	2.90	2.94	1.21	2.69	1.66	---	---	---
Processing	---	.05	.06	.61	.84	-1.62	-1.62	-1.62	-1.62	-1.62	---	---	---
All	---	7.37	4.93	4.25	3.06	.40	.43	.31	.97	.80	---	---	---

[1] Equivalent on-tree returns.

Source: Agricultural Prices, CRB, ESS.

Table 26—Fresh fruit: Retail prices, marketing margin, and grower and packer return per pound, sold in New York City, seasonal average, 1977/78-1979/80

Commodity and season	Retail price (cents)	Marketing margin		Grower and packer return[1] (f.o.b. shipping point price)[2]	
		Cents	Percentage of retail price	Cents	Percentage of retail price
Apples, Eastern Delicious:					
1979/80	38.0	13.2	35	24.8	65
1978/79	34.7	13.8	40	20.8	60
1977/78	37.9	16.6	44	21.3	56
Apples, Eastern McIntosh:					
1979/80	36.9	18.1	49	18.8	51
1978/79	31.0	15.7	51	15.3	49
1977/78	40.5	24.1	60	16.4	40
Grapes, Emperor:					
1979/80	93.9	59.9	64	34.0	36
1978/79	85.6	52.1	61	33.5	39
1977/78	72.4	42.8	59	29.6	41
Grapefruit, Florida:					
1979/80	42.4	33.9	80	8.5	20
1978/79	33.2	26.1	79	7.1	21
1977/78	21.3	15.4	72	6.1	28
Lemons, Western:					
1979/80	80.1	53.1	66	27.0	34
1978/79	86.0	59.0	69	27.0	31
1977/78	54.1	34.6	64	19.5	36
Oranges, California Navel:					
1979/80	49.7	35.6	72	14.1	28
1978/79	58.6	40.0	68	18.6	32
1977/78	39.4	24.8	63	14.6	37
Oranges, California Valencia:					
1979	57.2	38.7	68	18.5	32
1978	43.3	27.0	62	16.3	38
1977	30.2	18.5	61	11.7	39
Oranges, Florida:					
1979/80	31.6	21.9	69	9.7	31
1978/79	30.5	18.9	62	11.6	38
1977/78	23.0	12.2	53	10.8	47

[1] For quantity of product equivalent to retail unit sold to consumer. Because of waste and spoilage during marketing equivalent quantity exceeds retail unit. [2] Production area and season: Apples, Eastern Delicious-New York State (Oct.-May); Apples, Eastern McIntosh-New York State (Nov.-May); Grapes, Emperor-California (Oct.-Apr.); Grapefruit-Florida (Nov.-Apr.); Lemons-California (Aug.-July); Oranges, California Navel (Dec.-May); Oranges, California Valencia (May-Nov.); Oranges-Florida (Nov.-May).

Table 27—U.S. exports of selected dried fruits and tree nuts by destination, 1975/76-1979/80 seasons

Item and season[1]	Canada	Europe				Other	Total[3]
		United Kingdom	EC[2]	Other	Total[3]		
	Metric tons						
Prunes:							
1975/76	4,140	3,278	27,061	15,072	45,411	9,438	58,989
1976/77	4,193	2,100	18,570	14,013	34,684	8,913	47,789
1977/78	3,756	2,565	29,922	9,468	41,955	8,138	53,849
1978/79	3,269	1,952	19,291	8,959	30,202	9,491	42,962
1979/80	3,280	2,215	19,391	8,871	30,477	8,872	42,629
Raisins:							
1975/76	8,660	7,859	6,206	12,823	26,889	29,328	64,876
1976/77	6,141	2,599	3,417	9,252	15,269	15,045	36,455
1977/78	7,208	2,394	10,005	8,027	20,426	25,603	53,237
1978/79	4,139	985	4,253	4,615	9,853	7,593	21,585
1979/80	8,042	7,866	17,008	9,048	33,922	25,965	67,929
Shelled almonds:							
1975/76	1,513	3,795	21,280	8,385	33,460	12,215	47,187
1976/77	2,422	4,062	24,516	9,165	37,803	19,855	60,080
1977/78	2,449	4,038	27,118	8,436	39,592	20,480	62,521
1978/79	2,083	3,670	21,006	5,027	29,703	15,083	46,869
1979/80	1,814	4,822	42,833	9,296	56,951	19,384	78,149

[1] Season beginning September 1 for prunes and raisins and July 1 for almonds. [2] Belgium-Luxembourg, France, West Germany, Italy, Netherlands, Demark and Ireland. [3] Totals do not add due to rounding.

Source: Foreign Agricultural Service.

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